



Coordinated Human-Service Public Transportation Plan



August 2007

Dixie Metropolitan Planning Organization Coordinated Human-Service Public Transportation Plan

August, 2007

This plan has been prepared for the Dixie Metropolitan Planning Organization by H.W. Lochner, Inc.



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CHAPTER 1: EXECUTIVE SUMMARY

Human Service Transportation programs are specialized transportation services that provide the less mobile members of our community access to their destinations. Examples of Human Service Transportation programs include:

- Senior center vans
- Paratransit services
- Wheelchair equipped buses for the disabled
- Door to door service for those who cannot make it from the door to the curb independently
- Other similar types of transportation

In rural and growing communities, like the Dixie Metropolitan Planning Organization (MPO) area, services such as these are critical for people who cannot supply their own transportation. Unfortunately, communities with continued growth that are transitioning from rural to urban form often face challenges meeting the transportation needs of the disadvantaged.

Coordination – the act of multiple agencies working together to meet their client’s various transportation needs – has been identified by many as a key method for addressing these challenges. In fact, coordination is now a requirement for recipients of federal funding for programs; like the Section 5310 program that supplies buses for senior centers and for programs that serve people with disabilities. As an incentive, Congress has authorized increased funding through two new programs. In order to access the funding, however, agencies must be part of a coordinated plan.

The Dixie MPO Coordinated Human Service Public Transportation Plan will establish the Dixie MPO as an eligible recipient of these new funds, while maintaining its eligibility for funds from the Section 5310 program. It does this by:

- Identifying the transportation needs of seniors, people with disabilities, and people with low incomes
- Inventorying available services
- Identifying gaps in service, redundancies, and other service related issues
- Recommending strategies that address the issues to better meet the needs
- Prioritizing strategies for funding and implementation

The plan is comprised of four chapters and an appendix. This summary is the first chapter. The second chapter provides background information on concepts of coordination and the regulatory history leading up to today’s new requirements. Chapter 3 provides information about how the plan was developed, including details on how the new federal requirements were met. Chapter 4 is the bulk of the plan. It contains information about local needs, services, and issues, and recommends strategies and priorities for the Dixie MPO area. Following these chapters is a set of appendices. The first appendix, the Coordination Toolbox includes tools to assist agencies within the Dixie MPO, as well as the MPO itself, with the tasks of coordination. Appendix B provides the survey that was used in developing the plan.

Together, these materials represent a major step forward in identifying ways to improve transportation for the transportation disadvantaged living in the Dixie MPO.

PLAN HIGHLIGHTS

NEEDS

The following needs and issues were identified in the Dixie MPO area:

- Medical transportation
- Access to services located on the outskirts of St. George
- Employment related transportation
- Lack of understanding about liability and eligibility
- Education about available services and assistance
- Political support from local elected officials
- Funding for operating expenses and service expansion

STRATEGIES AND PRIORITIES

In response to the needs and issues identified, seven strategies were developed. The strategies are given below, with the priority level in parenthesis.

Strategy 1 – Conduct regularly scheduled human service public transportation coordination meetings (immediate)

Strategy 2 – Educate service providers & local elected officials about the benefits of coordination, opportunities to coordinate, and issues associated with coordination (immediate)

Strategy 3 – Facilitate opportunities for service providers to pool resources (short term)

Strategy 4 – Discuss NEMT services and issues with Division of Healthcare Financing (short term)

Strategy 5 – Explore opportunities to utilize JARC and New Freedom funds to expand existing Fixed Route and Paratransit services (short term)

Strategy 6 – Establish a Rural Planning Organization (long term)

Strategy 7 – Establish a regional transit authority (long term)

CHAPTER 2: INTRODUCTION

The Dixie MPO Coordinated Human-Service Public Transportation Plan is among the first of such plans developed in the State of Utah. Although practitioners have applied the concept of planning for coordination of human-service transportation programs for many years, it was not until the passage of the Safe, Accountable, Flexible, Efficient, Transportation Equity Act: A Legacy for Users (SAFETEA-LU) in 2005 that coordination became a requirement. This chapter answers some basic questions about SAFETEA-LU requirements for coordination planning and provides information on how the plan is organized. For simplicity, the information presented in this chapter is organized into a question and answer format.

WHAT IS A COORDINATED HUMAN-SERVICE PUBLIC TRANSPORTATION PLAN?

A coordinated human-service public transportation plan is a document to help guide local decision makers and service providers with improving community transportation systems by:

- Identifying the transportation needs of individuals with disabilities, senior citizens, and people with low-incomes
- Providing strategies to meet local needs
- Identifying priority transportation services for funding and implementation.

WHY IS DIXIE MPO DEVELOPING SUCH A PLAN?

The Utah Department of Transportation (UDOT) has partnered with United We Ride, a federal interagency initiative and the Dixie MPO to develop a coordinated human-service transportation plan that allows the MPO to be eligible for new funding sources for human-service public transportation programs and provides continued access to funds available through the Elderly Individuals and Individuals with Disabilities Program (Section 5310). These new funding sources were made available through the most recent transportation funding bill called SAFETEA-LU.

WHAT IS SAFETEA-LU AND HOW DOES IT RELATE TO THIS PLAN?

On August 10, 2005, President George W. Bush signed into law the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). With guaranteed funding for highways, highway safety, and public transportation totaling \$286.4 billion, SAFETEA-LU represents the largest surface transportation investment in United States history.

NEW FUNDING

SAFETEA-LU provides funding for three human-service transportation programs administered by the Federal Transit Administration (FTA):

- Job Access Reverse Commute Program (Section 5316)
- New Freedom Program (Section 5317)
- Elderly Individuals and Individuals with Disabilities Program (Section 5310)

These three federal programs provide formula funding for states and communities and are targeted to enhance transportation services for specific populations who depend on alternative transportation options for their day-to-day mobility. In addition, SAFETEA-LU enacts President Bush's Executive Order on Human Service Transportation Coordination (EO 13330), signed on February 24, 2004, which mandates coordination among human service transportation programs.

COORDINATION PLANNING REQUIREMENT

SAFETEA-LU requires the development of a coordinated human-service public transportation plan for individuals with disabilities, low-incomes and senior citizens. The legislation instructs state agencies to develop the plan "through a process that includes representatives of public, private, and non-profit transportation and human-service providers" including "participation by members of the public." The Dixie MPO Coordinated Human-Service Public Transportation Plan was developed to fulfill these requirements, thereby identifying opportunities to improve coordination among transportation and human-service providers in the Dixie MPO area.

WHAT IS THE HISTORY LEADING UP TO THE SAFETEA-LU REQUIREMENT FOR COORDINATION?

According to the *Tool Kit for Rural Community Coordinated Transportation Services*, the concept of coordinating transportation services first emerged in a formal setting in the 1960s and 1970s. As early as 1964, the special service requirements for elderly and "handicapped persons," included in the Federal Urban Mass Transportation Act, formed the beginning of a long list of human-service transportation programs.

By 2003, over 62 human-service transportation programs were identified in a Federal Government Accountability Office (GAO) regulatory review. The GAO report identified the following:

- There was no single law or statute that generated a comprehensive federal human-service transportation program
- There was not uniformity in program delivery, reporting, and eligibility requirements, therefore each program had developed its own idiosyncratic regulations, eligibility requirements, and operating procedures
- Many federal human-service transportation programs were unknowingly funding the same type of service as other federal programs
- At least 37 programs provided reimbursement to consumers for transportation expenses incurred as part of accessing employment, health care, or other specific types of services
- At least 26 programs either funded the purchase or operation of vehicles or facilitated contractual arrangements with existing providers for vehicles
- At least eight programs provided transportation to schools.

The GAO report concluded that coordination was an important management strategy to address these issues and the increasing number of human-service transportation programs. In response to the GAO report and other factors, President Bush established the Federal Interagency Coordinating Council on Aging and Mobility (CCAM) through EO 13330. The

Executive Order designated CCAM as the entity responsible for coordinating the 62 federal programs identified in the GAO report.

In addition, the Executive Order requires CCAM members work together to provide the most appropriate, cost effective services utilizing existing resources and to reduce duplication, which allow funds to be available for additional services. CCAM seeks to simplify access to transportation services for persons with disabilities, persons with low-incomes, and senior citizens.

WHAT IS THE UNITED WE RIDE INITIATIVE?

To implement Executive Order 13330, CCAM launched the United We Ride initiative and website (www.unitedweride.gov). United We Ride is a federal interagency initiative supporting states and their localities in developing coordinated human-service public transportation plans. United We Ride helps communities break down barriers between programs and sets the stage for local transportation partnerships. By working with states and communities to address gaps and needs related to human-service transportation, United We Ride helps local agencies develop and execute action plans.

The United We Ride initiative includes:

- Help Along the Way: This technical assistance program provides hands-on assistance to states and communities in coordinating their human-service transportation programs.
- A Framework for Action: This self-assessment tool provides states and communities with a roadmap to identify areas of success and areas where improvement is still needed.
- State Coordination Grants: State Coordination Grants are available to states for human-service transportation coordination efforts.

WHAT IS COORDINATION?

Coordination of transportation services is a process in which two or more organizations (who may not have worked together previously) interact to jointly accomplish their transportation objectives. Coordination results in improved resource management and improved cost-effectiveness in service delivery.

Coordination works by eliminating inefficiencies within disparate operations and service patterns often resulting from a multiplicity of providers. When appropriately applied, coordination can lead to significant cost savings for providers and programs. Citizens with transportation needs often benefit from greater access and mobility and higher quality services. Coordination is recognized as one of the best ways to improve mobility, even when resources are limited.

WHAT ARE THE BENEFITS OF COORDINATION?

Coordination can lower the costs of providing services by addressing inefficiencies in the current use of transportation resources. Most communities apply these cost savings to increase the number of trips served, thus increasing overall service effectiveness.

The combination of increased efficiency and increased effectiveness can create lower unit costs, such as costs per trip, per mile, or per hour. Benefits commonly observed from coordinated transportation services include:

- Lowered trip costs for travelers and human-service agencies
- Extended service hours
- Service to new areas or new communities
- Increased ridership
- Improved service to customers regarding schedules, points of origin, and destinations
- Improved safety and customer service
- Expanded door-to-door service
- More flexible payment and service options.

WHAT ARE THE ELEMENTS OF THE PLAN?

This plan includes the following five key elements, as required under FTA guidelines for coordination planning:

1. An assessment of available services and identification of current providers
2. An assessment of transportation needs for individuals with disabilities, senior citizens, and people with low incomes (referred to in this plan as the targeted population)
3. An evaluation of gaps in service and of other opportunities for improving transportation services
4. Strategies and/or activities to address the identified gaps and to achieve efficiencies in service delivery
5. Implementation priorities.

Elements 2 and 3 are combined under the needs identification section of Chapter 4.

HOW WAS THE PLAN DEVELOPED?

The plan was developed in close coordination with the Dixie MPO planning staff, Utah's United We Ride Workgroup, and the UDOT Public Transit Team. A consultant assisted in bringing the information together, ensuring that FTA requirements were met. Detailed information about the methods used to develop each section of the plan is included in the following chapter.

HOW DOES THIS PLAN RELATE TO UTAH'S COORDINATED HUMAN SERVICE PUBLIC TRANSPORTATION PLAN?

The Dixie MPO Coordinated Human Service Public Transportation Plan is available in two formats. This format is the standalone version. A second format is available that includes a full excerpt of Chapter 4, with additional information from Chapter 3, which have been incorporated into the Statewide plan. The statewide plan includes exactly the same information as that which is presented in this plan, but it also includes details from all of the other MPO's in the state, as well as information from the rural Association of Government areas. Readers are encouraged to review the Five County AOG section of Utah's Coordinated Human Service Public Transportation Plan for insights affecting the rural areas that surround the Dixie MPO.

CHAPTER 3: METHODS

The Dixie MPO Coordinated Human-Service Public Transportation Plan evaluates public transportation services within St. George City, Washington City, Santa Clara City, Ivins City and the unincorporated areas of Washington County located within the MPO boundaries. The Dixie MPO Plan focuses on services for senior citizens, individuals with disabilities and low income individuals within the MPO boundaries.

Two primary objectives were identified in developing the Dixie MPO Coordinated Human Service Public Transportation Plan:

- Meet FTA requirements for Coordinated Planning
- Educate service providers about the benefits of coordination

The means for achieving these objectives is described below.

FTA REQUIREMENTS:

As of October 2006, at the onset of the planning process, FTA had not yet finalized guidance for developing a coordinated human service public transportation plan. As such, this plan relies upon the requirements outlined in Proposed Circular FTA C 9070.1F, made available for review on September 6, 2006. The Proposed Circular states projects selected for funding under Section 5310, 5316 and 5317 "must be derived from a locally developed, coordinated public transit-human services transportation plan that minimally includes the following elements at a level consistent with available resources and the complexity of the local institutional environment:

- An assessment of available services that identifies current providers (public, private, and non-profit)
- An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes
- Strategies and/or activities to address the identified gaps and achieve efficiencies in service delivery
- Relative priorities for implementation based on resources, time, and feasibility for implementing specific strategies/activities identified"

Details on the methods utilized to address each of these areas follow.

INVENTORY OF AVAILABLE SERVICES

Available services were inventoried in a three-step process. The Utah Rural Specialized Transportation Association (URSTA) directory was used as the starting point. This directory was expanded during the first phase of the project through coordination with Dixie MPO staff. MPO staff was asked if they knew of any additional transportation services available in their area. The additional services identified were added to the directory including contact information and mailing addresses. The directory became the invitation list for the Dixie MPO Human Service Provider Transportation Workshop (see below).

During the workshop, participants were asked to list all the services they provide or of which they are aware. This allowed the team to identify the level of familiarity of meeting participants with the local transportation system, while also providing a reference for cross checking the list of available services. Additional services not already included on the list were added.

A survey with questions specifically designed to add detail to the inventory of available transportation services was distributed at the workshop meeting and to agencies on the mailing list. The information collected was added to the database of available services.

The inventory is reported under the Area Overview section for each AOG. Data is provided in summary format with detailed information for agencies that responded to the survey. Less detailed information for other services, those agencies that did not return a survey, is provided in a brief table.

IDENTIFICATION OF TRANSPORTATION NEEDS, GAPS IN SERVICE AND OTHER ISSUES

The study used information from members of the targeted population and service providers to assist in the identification of transportation needs. During the meetings, participants were asked questions such as, "Where do you need to go on a daily basis?" and, "What types of services do you use?" Other questions were asked to inquire about the frequency at which participants need access to the services they use. Participants were also asked about the times of day when they need transportation to the services being discussed. In addition, questions were asked as needed to determine the list of needs for each area. Through this line of questioning and the resulting discussions the team was able to develop an understanding of the transportation needs unique to the Dixie MPO.

To further identify the basic needs for each of the three targeted population groups, the team supplemented the insight gained at the outreach meetings with information available from the service provider survey conducted as part of this study (see Appendix B).

The findings are summarized under headings which capture common themes from the responses gathered at the outreach meetings and from the data presented in the surveys.

To reduce the use of technical language and jargon at workshop, the team expanded the discussion of "gaps and redundancies" to a broader topic of "issues." Agencies were asked to report any gaps or redundancies in service, as well as other issues associated with delivering transportation services to their clients.

Recognizing agencies might not be aware of, or willing to report knowledge of redundancies, the list of available services in each area was reviewed to generate insights into any potential duplication in service patterns.

To provide a user-friendly format, the findings from the evaluation of gaps, redundancies, and other issues are reported as a discussion for each of the needs identified.

IDENTIFICATION OF STRATEGIES TO ADDRESS NEEDS AND GAPS IN SERVICE

Strategies were identified through a combined evaluation of information collected at the outreach meetings and published information about successful strategies being applied in other areas.

During workshop and focus group meetings, participants were led through an exercise designed to enable them to develop strategies addressing issues and better meet the identified needs. As this exercise was conducted, the ideas generated were recorded.

Allowing the meeting participants to identify strategies themselves engenders a sense of ownership of the strategies identified. This sense of ownership leads participants to become more excited about the ideas, and more likely to implement them, than if the ideas were presented by an outside group. However, relying solely on participants to develop strategies limits the development of potential strategies to only those conceived during the exercise. To capitalize on the significant progress made in other areas toward developing successful coordination programs, the team also evaluated examples of successful coordination efforts from other areas as potential strategies to be applied at the local level.

Based on the local conditions and the information gained at the outreach meetings, the team identified successful coordination strategies from other areas that have a high potential for success in the Dixie MPO area.

PRIORITIZATION OF RECOMMENDED STRATEGIES

Priorities were identified in this plan as recommendations for the Dixie MPO to consider as it moves forward in implementing coordination at the local level. The following criteria were used to identify the priority levels.

1. Feasibility of Implementation: How likely is it the recommended strategy can be implemented in the near term, given the context of funding, political views, and other factors?
2. Number of Needs Addressed: How many of the needs identified are met by the recommended strategy?
3. Position within Critical Path: Do other strategies rely on implementation of the recommended strategy or can it be implemented independently?

Based on an evaluation of these criteria, each strategy was given a priority level based on timeline that includes immediate, short term and long term benchmarks. Higher priority strategies were identified for immediate implementation, while lower priority strategies were identified in the long term horizon.

PUBLIC OUTREACH

According to SAFETEA-LU the Dixie MPO Coordinated Human-Service Public Transportation Plan is required to be “developed through a process that includes representatives of public, private, and non-profit transportation and human-service providers and participation by members of the public.” In keeping with this requirement, information for the Dixie Metropolitan Planning

Organization Plan was collected directly from stakeholders within Washington County through two different outreach methods (see detailed descriptions below):

- Washington County Human-Services Public Forum
(Open to the general public to discuss the provision of all types of human-services)
- Human-Service Transportation Service Provider Workshop
(Specifically focused on gaining input from human-service and transportation providers about transportation services for members for the targeted population)

WASHINGTON COUNTY HUMAN-SERVICES PUBLIC FORUM

The Human-Services and Economic Development Department of the Five County Association of Governments held the 14th Annual Human-Services Public Forum on Thursday, April 5, 2007 from 3:00 – 4:30 p.m. at Dixie State College, St. George, Utah. Over the years, many important program developments have been initiated at these public forum gatherings. The 14th Annual Human-Services Public Forum provided Washington County residents, service providers and community leaders with the opportunity to express concerns, discuss, examine and prioritize the provision of human-services in Washington County. Topics addressed at the forum included literacy/ESOL, education, transportation, housing, emergency services/disaster preparedness and senior programs. Approximately 30 Washington County residents, service providers and community leaders attended the forum.

At the forum a brief presentation about transportation coordination was given and attendees were provided with the opportunity to comment on the provision of transportation services to members of the targeted population. Attendees were asked to respond to the following five questions:

- What are your transportation needs?
- What transportation services are available to you?
- What are some of the issues you face when seeking to get from one place to another?
- Do you have any ideas for improving transportation in your area?

Note: Human-service and transportation providers who responded to the questions above answered on behalf of their clients.

Responses to the questions were used to develop an understanding of the transportation needs, gaps in service and other issues unique to Washington County. They provided facilitators of the transportation service provider workshop (see below) with a preliminary overview of key topics introduced at the forum to discuss in detail during the workshop.

DIXIE MPO HUMAN-SERVICE TRANSPORTATION SERVICE PROVIDER WORKSHOP

The Dixie MPO Human-Service Transportation Service Provider Workshop was held on Tuesday, June 26th, 2007 from 11:00 a.m. – 2:00 p.m. at the Five County Association of Governments Building. Following is a description of the characteristics of the workshop.

Targeted Audience: The Service Provider Workshop focused on gaining input specifically from human-service and public transportation providers and MPO staff. Initial contact with providers was made by a representative from Dixie MPO. Invitations were then sent to service providers via email requesting the agency send one or more representatives to attend the workshop. It was requested that the representative(s) who attended the workshop be involved in providing transportation for their organization, and/or be familiar with the transportation needs of their clients.

Activities: The Service Provider Workshop was facilitated by two members of the Consulting Team and supported by MPO staff. Workshop attendees engaged in a series of activities which supplied insight into each of the five elements of the plan. Detailed notes were kept to document information provided during the workshop.

Objectives:

- Initiate coordination and networking among human-service and public transportation providers and MPO/AOG representatives
- Distribute service provider surveys (Note: The survey used at the Dixie service provider workshop was a modified version of the survey used for the Rural Coordinated Transit Project; however questions considered not relevant were removed [see Appendix B]).
- Discuss key issues identified at the public forum
- Allow human-service and public transportation providers to provide valuable insight into the five elements of the study

Information about transportation needs, gaps in service and other issues collected at the Service Provider Workshop was used as the basis for developing the Dixie MPO Plan.

Following is a contact list of human-service providers invited to attend the Dixie MPO Human-Service Transportation Service Provider Workshop. A total of 16 human-service providers attended. The contact list should be used as a tool for future coordination efforts. It is not comprehensive and over time should be expanded as human-service providers highlight their interest in transportation coordination efforts.

TABLE 1: AGENCY CONTACT LIST

<u>Agency Name</u>	<u>Contact Person</u>	<u>Street Address</u>	<u>City, State, Zip</u>	<u>Phone Number</u>	<u>Email</u>
Red Rock Center for Independence/Arc	Terry Hawks	515 W 300 N #A	St. George, UT 84770	435-673-7501	terry@rrci.org
Red Rock Center for Independence/Arc	Merlene Wall	515 W 300 N #A	St. George, UT 84770	435-673-7501	merlene@rrci.org
Dixie State	Sherry Ruesch	225 S 700 E	St. George, UT 84770	435-652-7562	ruesch@dixie.edu
TURN Community Services	Susan Johnson	334 W Tabernacle	St. George, UT 84770	435-559-1757	ccturn@gwest.net
Washington County School District	Bob Green	121 W Tabernacle	St. George, UT 84770	435-673-3553 x228	brgreen@wash.k12.ut.us
Dixie Care & Share	Robert Schaefer	131 N 300 W	St. George, UT 84770	435-628-3661	roberts@dixiecareandshare.org
Dixie Care & Share	Kara Coop	131 N 300 W	St. George, UT 84770	435-628-3661	dixiecons@infowest.com
Danville Services	Jamie Farnham	145 N 400 W	St. George, UT 84770	435-634-1704	jfarnham@donserv.com
Danville Services	Rod Ross	145 N 400 W	St. George, UT 84770	435-634-1705	rross@donserv.com
Utah State Office of Rehabilitation (Voc. Rehab)	Jennifer Lyon	1067 E Tabernacle #10	St. George, UT 84770	435-673-5091	jilyon@utah.gov
Washington County Minibus	Vince McFadden	245 N 200 W	St. George, UT 84770	435-634-5716	vjmcfadd@washco.state.ut.us
Washington County Senior Center in St. George	Betty McCarty	245 N 200 W	St. George, UT 84770	435-634-5716 x1001	bemccarty@washco.state.ut.us
DSPD (Department of Services for People with Disabilities)	Karla Campbell	377 E. Riverside Drive	St. George, UT 84790	435-628-7131	karlacampbell@utah.gov
DSPD (Department of Services for People with Disabilities)	William Campbell	377 E. Riverside Drive	St. George, UT 84790	435-981-3519	wcampbell@utah.gov
St. George City	Ryan Marshall	953 Redhills Parkway	St. George, UT 84790	435-673-8726	ryan.marshall@sgcity.org
Dixie MPO	Curt Hutchings	1070 W 1600 S, Building B	St. George, UT 84770	435-673-3548	chutchings@fcaog.state.ut.us
Five County Association of Governments	Beth Cottam	1070 W 1600 S, Building B	St. George, UT 84770	435-673-3548	bcottam@fcaog.state.ut.us
Social Security Office St George	Bob Frisbey	923 S River Run Rd.	St. George, UT 84790	435-674-9226	bob.frisbey@ssa.gov
Social Security Office St George	Deb Fogarty	923 S River Run Rd.	St. George, UT 84790	435-674-9226	deborah.fogarty@ssa.gov

CHAPTER 4: FINDINGS

This chapter is the heart of the Dixie MPO Coordinated Human Service Public Transportation Plan. It is comprised of the following sections:

Area Overview: A description of the local area, including an inventory of available transportation services, information about area demographics and local jurisdictions, and other relevant information.

Transportation Needs: A summary of the needs identified for the area, including a discussion about gaps and redundancies in service, barriers to service, and other issues.

Strategies to Meet Needs: A list of proposed strategies that address the issues to better meet the identified needs.

Priorities: A summary of the strategies and the recommended priority level for each.

AREA OVERVIEW



The Dixie Metropolitan Planning Organization (Dixie MPO) is the designated agency, as established by the State of Utah, responsible for comprehensive transportation planning in the urbanized and urbanizing areas of Washington County, Utah. The Dixie MPO area is divided into an interim planning area, and a larger MPO planning area. The interim area encompasses St. George City, Washington City, Santa Clara City, and Ivins City. These areas are referred to in this document as the Urban Areas. The MPO planning area adds the cities of Toquerville, La Verkin and Hurricane. These areas are referred to as the Rural Areas in this plan. The MPO planning area is depicted in Figure 1.

Dixie MPO is located within and administered by the Five County Association of Governments (FCAOG), which is a voluntary association of local governments from the five southwestern counties of the State of Utah. The overall purpose of FCAOG is to provide a forum to identify, discuss, study, and resolve area-wide planning and development concerns. Additional information about FCAOG is available under the rural portion of the Utah Coordinated Human-Service Public Transportation Plan.

Transportation planning is conducted at the MPO level and the Long Range Transportation Plan, (LRTP) is the mechanism for unified regional transportation planning. The LRTP is updated on a five year cycle, and covers a 30 year planning horizon. The current LRTP was adopted by the Dixie MPO board in June 2007.

The LRTP states that the Dixie MPO encourages the expansion of public transit throughout the region, as demand grows and political will and funding allows, and to provide:



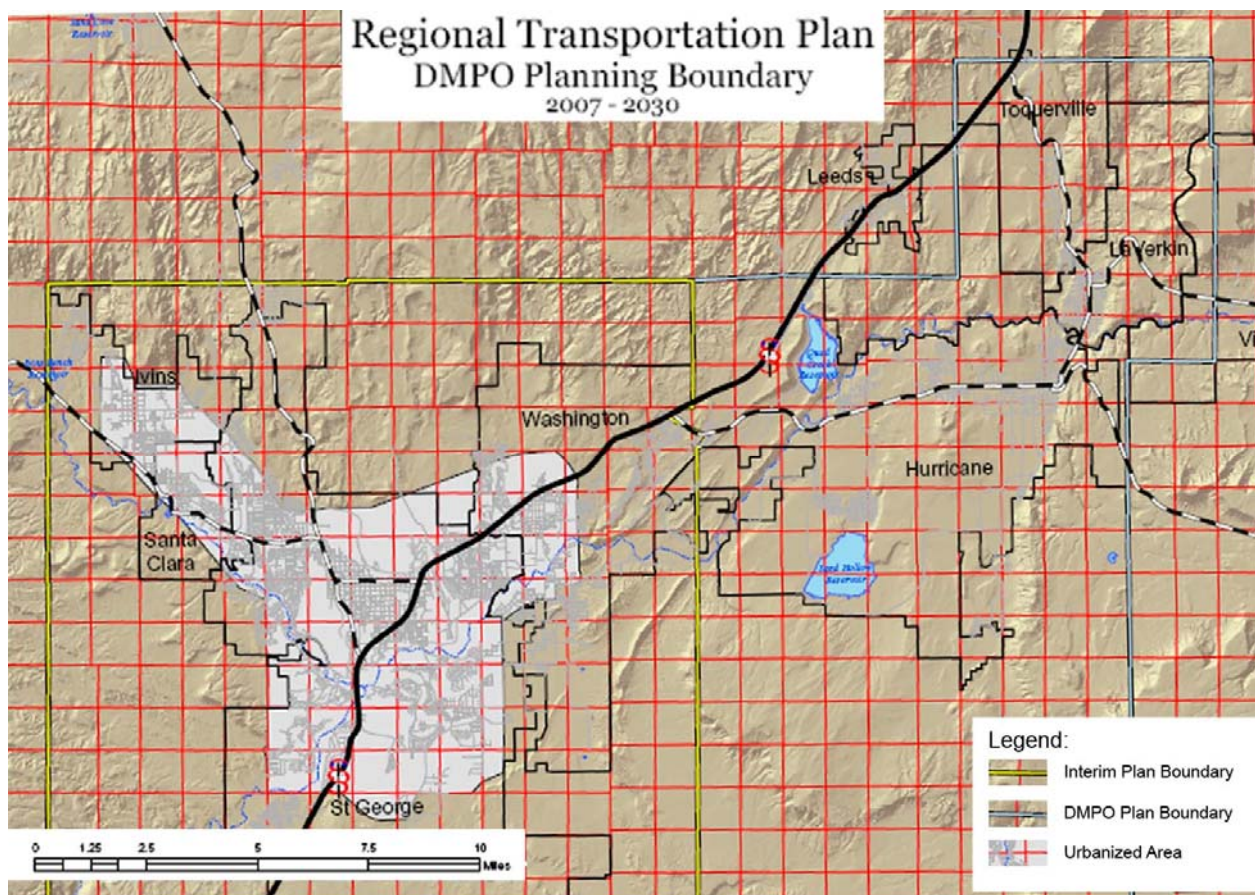
1. Alternative modes to make regional trips
2. Access for work, business, social, recreational, and other trip demand for persons with disabilities, the elderly and low income families, and households with zero or 1 car
3. To provide job access and reverse commute trip needs
4. To help reduce single occupancy vehicles during peak travel demand

As a new requirement, coordination planning for human service transportation services is not yet incorporated into the LRTP. However, the LRTP indicates that:

- "The Dixie MPO recognizes the value of, and supports efforts to more fully coordinate, the specialized transportation needs of elderly individuals, individuals with disabilities and eligible low income individuals."
- Dixie MPO will "facilitate the inclusion of projects proposed for funding to be listed in the Transportation Improvement Program (TIP) and the Statewide Transportation Improvement Program (STIP), which may include specific projects or more aggregated program level information."

More information about the Dixie MPO and the LRTP process can be found on the Dixie MPO website, located at <https://www.dixiempo.org>.

FIGURE 1: DIXIE MPO PLANNING AREA



Source: Adapted from image in Dixie MPO LRTP

LOCAL AREA CONDITIONS

St. George is located in the southwest corner of Utah along the Interstate 15 corridor. Over two million international travelers visit the area annually. Washington County experiences mild, low humidity winters with over 300 sunny days per year. The desert climate, elevation 2,760 feet, promotes year round recreation and leisure activities, which includes ten championship golf courses. Over the past decade, the region has become a magnet for in-migration as baby-boomers and California retirees move into the area.



As the largest regional city in southern Utah, St. George is a major destination for members of the targeted population both within Washington County, as well as those living in surrounding communities. Major destinations include Dixie State College, Dixie Regional Hospital, Dixie Dialysis Center, Tuacahn Center for the Arts, Zion National Park, St. George Senior Center, LDS St. George Temple, a variety of state health and human service agency offices, and multiple employers.

INVENTORY OF AVAILABLE TRANSPORTATION SERVICES

Many of the human service agencies present in the area provide transportation to their clients. This section provides information about the human service and public transportation programs in the area. Detailed information for service providers that replied to the Service Provider Survey is provided in the text that follows. In addition, Table 3 provides an inventory of information collected during the service provider workshop. Combined, these two sources of information outline the full spectrum of transportation services available to members of the targeted population in the Dixie MPO area.

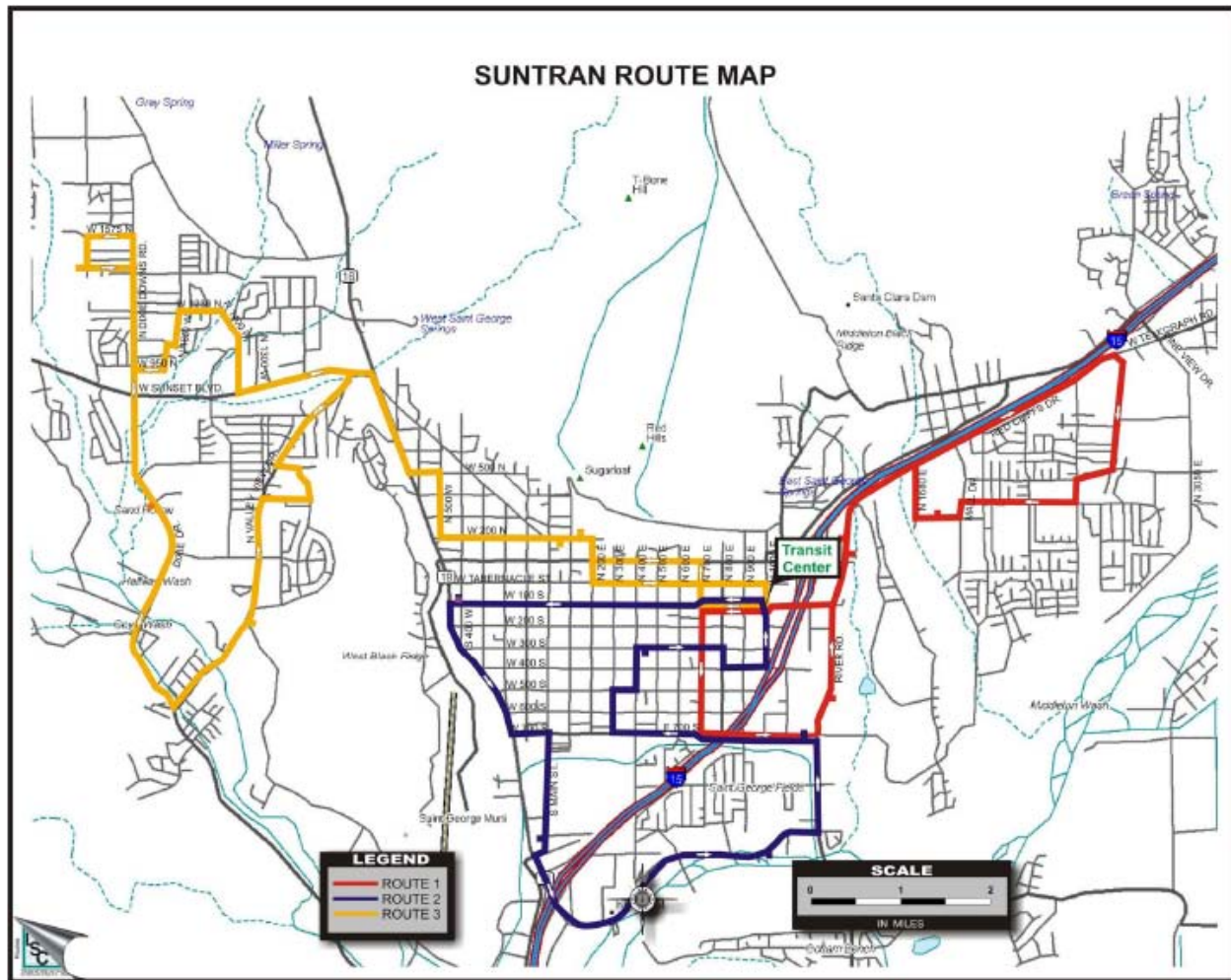
SUNTRAN



St. George City is served by one fixed-route public transportation provider known as SunTran. As a municipal service funded partially through municipal tax dollars, SunTran only serves the City of St. George.

SunTran buses provide service on three routes throughout St. George. Buses run Monday through Friday from 6:00 a.m. to 8:00 p.m. and Saturday 8:00 a.m. to 6:00 p.m. The three routes connect at the transit center located at Dixie State College. The Red Cliffs and Valley View routes depart from the transit center every half hour. The Riverside route departs from the transit center on the hour. See Figure 2 for route details.

FIGURE 2: SUNTRAN ROUTE MAP



Source: Dixie MPO

In addition to municipal funding, SunTran also receives support through three FTA grant programs: Section 5307, Section 5309, and Section 5311. These funds are programmed through the Dixie MPO as part of the metropolitan transportation planning process. Table 2 shows available funding from these programs, from the current LRTP.

As part of the service provider survey (see Chapter 3: Methods, for information about the survey), a SunTran representative indicated that approximately 50-75 percent of its customers have some type of transportation limitation. The SunTran representative also indicated that customers sometimes request to go outside of the system boundaries. In the RCTP survey, SunTran indicated a high level of involvement in coordination activities, and expressed interest in providing transportation services to other agencies on a contractual basis.

All SunTran buses are wheelchair accessible. Persons with disabilities, whether physical or cognitive, are instructed to ride the fixed-route service if they are able to get to and from the bus stops. Individuals who are ADA eligible and are unable to get to and from the bus stops may schedule rides through a special curb-to-curb service by calling 24 hours in advance. This special

service costs \$2.00 per person per ride. This service is provided to locations that are within 3/4 mile of a fixed-route stop. For information about ADA certification, customers can call SunTran at 673-TRAN.

TABLE 2: PROJECTED TRANSIT REVENUES

		Match %	Grant Program	2007	2016	2026	2030	2035
SunTran			5307	690,000	7,500,000	15,800,000	19,600,000	23,400,000
	Operation Match	50/50		433,000	4,725,000	9,954,000	12,348,000	14,742,000
	Enh/PM Match	80/20		257,000	2,775,000	5,846,000	7,525,000	8,658,000
SunTran			5309	850,000	9,300,000	20,600,000	24,100,000	28,800,000
	Fac/Bus	80/20		850,000	9,300,000	20,600,000	24,100,000	28,800,000

Source: Dixie MPO

REDROCK CENTER FOR INDEPENDENCE

Located in St. George, and serving a nine county area in the southwestern portion of Utah, the Redrock Center for Independence (RRCI) mission is to assist people with disabilities to live and participate independently. The RRCI vision statement describes a vision of a time when "everyone is on common ground to live, work and play."

To achieve these goals, the RRCI provides a variety of services aimed at assisting individuals with achieving independence. Taken from their website, these programs include:

- Information and Referral
- Nursing Home Transition
- Peer Support
- Independent Living Skills Training
- Advocacy
- The Elder Blind Program
- Assistive Technology
- Loan Bank

More information about these services is available at the RRCI website at <http://www.rrci.org/services.html>.

Two surveys were completed by representatives from the RRCI (one as part of the RCTP project, the other during the Dixie MPO Transportation Workshop). Based on information received through these surveys, the RRCI is a private non-profit agency that serves Millard, Sevier, Beaver, Iron, Piute, Wayne, Garfield, Washington and Kane counties. The RRCI directly serves both senior and disabled populations. Many of its clients are also low income, and income is a factor in determining eligibility for RRCI services. Funds for RRCI are restricted to people with disabilities and people with low incomes. Approximately half of the RRCI clientele have transportation limitations.

The RRCI does not own vehicles for transporting clients. RRCI indicated that transportation is a barrier for clients who seek RRCI services. The top reason given for this is that services are not available. The second reason given is that existing transportation services do not serve locations where RRCI services are located. In some cases, the RRCI has purchased bus passes from the Five County AOG for client use. RRCI clients are offered transportation by RRCI employees, who

utilize their personal vehicles for client transport. Employees are reimbursed for client trips at a rate of \$ 0.37 per mile.

In response to the Survey the two respondents answered differently to the final question about the agency's interest in coordination. One survey indicated a high level of interest in coordination, while the other indicated a relatively low interest. The reason for this inconsistency is unknown, and suggests that follow up consultation with this organization will be required during implementation of this plan.

The RRCI is located at:

515 West 300 North # A
St. George UT, 84770

DANVILLE SERVICES

Danville Services, a full service company that provides residential and vocational assistance to people with disabilities, is located in St. George, and serves the Washington County area. Danville Services operates in locations throughout Utah as well as Arizona, Nevada and Oregon. Their motto is "Helping each person achieve their desired quality of life".

Danville provides services for the disabled population, including:

- Residential
- Assisted Living
- Supported Employment
- Day Services
- Respite

More information about these Danville Services is available on their website at:
<http://www.danserv.com/>.

A survey was completed by a representative from Danville Services during the Dixie MPO Transportation Workshop. Based on information received, Danville Services is a private – for profit agency that serves Washington County – St. George, Santa Clara, Bloomington, Hurricane, Leeds, and La Verkin. Danville Services directly serves disabled populations with residential and vocational services. Transportation Funds are supported by the state of Utah and restrictions are different based in individual client needs.

Transportation is offered and restricted to current clients. Danville Services owns and leases their vehicles. Danville Services has concerns that clients from outlying areas cannot receive service due to limited transportation. Danville is interested in contracting to provide transportation services and pooling resources.

Danville Services is located at:

145 N 400 W
St. George, UT 84770

DIXIE CARE & SHARE

Dixie Care and Share is located in St. George, and serves the St. George and Hurricane areas. The facility creates a way to bring together community resources to operate food banks and emergency shelters in St. George and Hurricane.

Dixie Care and Share provides services to satisfy many requirements. Taken from their website, these serves include:

- Emergency Shelter
- Meals
- Showers
- Pantry
- Food Bank
- Emergency Clothing
- Salvation Army
- Transitional Housing
- Day Labor
- Case Management

More information about these services is available on their website at:

<http://dixiecareandshare.org/about/services/>.

A survey was completed by a representative from Dixie Care & Share during the Dixie MPO Transportation Workshop. Based on information received, Dixie Care & Share is a private non-profit agency that serves the communities of St. George and Hurricane. Dixie Care & Share directly serves the senior, low income, single parent, homeless, and transient populations. Dixie Care & Share does not own vehicles for transporting clients. In response to the Survey, Dixie Care & Share expressed a low level of interest in transportation coordination.

Dixie Care & Share is located at:

131 N 300 W
St. George, UT 84770

TURN COMMUNITY SERVICES

Located in St. George, and serving the Wasatch Front in addition to many other counties in the state of Utah, TURN's mission is "TURNing dreams into reality." According to their website, TURN is "dedicated to choice, quality, and respect for people with disabilities and those who serve them."

To achieve this mission, TURN offers a variety of services. Taken from their website, these services include:

- Community Living Supports
- Recreation Therapy
- Companion Services
- Family Support
- Host Home and Professional Parent Supports
- Innovative Partnerships Designed by People and Their Families
- Respite Care
- Summer Programs
- Supported Living and Personal Assistance
- Transition Supports and Services
- Transportation
- Day Supports, Senior Supports, and Adult Day Care
- Employment Supports
- Relationship and Behavior Training

More information about these services is available on their website at:
<http://www.turncommunityservices.org/services/>.

A survey was completed by a representative from TURN Community Services during the Dixie MPO Transportation Workshop. Based on information received, TURN is a private non-profit agency that serves the Wasatch Front, as well as Iron, Washington, Kane, Garfield, Beaver, and Sevier counties. TURN directly serves the disabled population. Funds for TURN are received by charging customers (Cedar City only) \$2.50 per trip, State Funds (DSPD), Federal Funds (Medicaid), donations, United Way, fundraising, and volunteers. Transportation funds are restricted for people with disabilities and seniors.

An approximate count of transportation vehicles is:

- 1, 1-2 Passenger Vehicle (this vehicle is wheelchair accessible)
- 2, 4-9 Passenger Vehicle
- 2, 10-15 Passenger Vehicles (1 is wheelchair accessible)

These vehicles function at full capacity on weekdays from 6:00 a.m. – 9:00 p.m. and 50%-75% on the weekends from 9:00 a.m. – 9:00 p.m. The agency drove a total 25,000 miles in their most recent fiscal year. TURN owns a portion of their vehicles and leases the remainder of their fleet.

TURN is concerned about the clients that they cannot serve with some recreational and long distant non-emergency medical trips. Concerns also arise in the need for transport aides, wheelchair accessibility, and clients in outlying areas. In response to the Survey, TURN expressed a high level of interest in transportation coordination.

TURN Community Services is located at:

334 W Tabernacle
St. George, UT 84770

UTAH STATE OFFICE OF REHABILITATION

The Utah State Office of Rehabilitation (USOR) St. George office serves the Five and Six County areas of southern Utah. Their mission is "To assist individuals with disabilities to prepare for and obtain employment and increase their independence."

To achieve this mission, USOR offers a variety of services. Taken from their website, these services include:

- | | |
|-----------------------------|--|
| - Becoming Independent | - Social Security Disability |
| - Employment | - Services for the Blind and Visually Impaired |
| - Training | - Services for the Deaf and Hard of Hearing |
| - Vocational Rehabilitation | - Councils |
| - Independent Living | |
| - Assistive Technology | |

More information about these services is available on their website at:
<http://www.usor.utah.gov/index.htm>

A survey was completed by a representative from USOR during the Dixie MPO Transportation Workshop. Based on information received, USOR directly serves the low income and disabled populations. The agency listed the top two transportation barriers for their clients as: 1) services not available and 2) transportation services do not serve locations where the agency services are located. The agency funds bus passes and has a migrant worker program that allows for some transportation. The requirement for these services is that one must have a disability that causes impediment to employment or qualify under the migrant tech program.

The agency owns one 4-9 passenger vehicle and typically provides non-emergency medical and employment trips for clients.

Voc, Rehab has concerns regarding rural clients struggling to find transportation for all needs. They serve low income clients who have a wide range of disabilities. In response to the Survey, USOR expressed no interest in transportation coordination.

Utah State Office of Vocational Rehabilitation is located at:

1067 E Tabernacle #10
St. George, UT 84770

WASHINGTON COUNTY COUNCIL ON AGING

Located in St. George, and serving Washington County, the Washington County Council on Aging is a government agency directly serving senior and disabled populations.

A survey was completed by a representative from Washington County Council on Aging as part of the RCTP project. Based on information received, 25% of the clients have transportation limitations. Services offered include, but are not limited to:

- Congregate Nutrition
- Home-delivered Meals
- Recreational/Social Events
- Senior Center
- Volunteer Opportunities

The eligibility requirement for these services is 60 years of age.

An approximate count of transportation vehicles are as follows:

- 1, 4-9 Passenger Vehicles
- 1, 10-15 Passenger Vehicle (wheelchair accessible)
- 3, 16-24 Passenger Vehicles (all are wheelchair accessible)

These vehicles function at 80% capacity on weekdays from 9:00 a.m. – 6:00 p.m. No service is provided on weekends. Total miles of operation are 39,532. Clients or employees are reimbursed for mileage when using their personal vehicle for agency-sponsored programs at a rate of \$0.485 per mile.

Funding is provided through the County, donations, State Funds (SSBG), and Federal Funds (nutrition program).

Washington County Council on Aging expresses concern regarding the lack of driver availability and not being able to cover all of their service area in a sufficient amount of time with the available drivers. They are also concerned about adequately meeting the number of non-emergency medical visits. The top transportation barrier reported is that transportation services are not available.

Washington County Council on Aging expressed low interest in transportation coordination, yet has high concern about who pays for insurance on vans and who pays for replacement and repairs if vans are shared with other agencies.

Washington County Council on Aging is located at:

245 N 200 W
St. George, UT 84770

WASHINGTON COUNTY SCHOOL DISTRICT

The Washington County School District (WCSD) offices are located in St. George. WCSD encompasses all of Washington County. In 1996, the district adopted the following mission statement: "Together: Pioneering New Horizons in Teaching, Learning, and Leading."

More information about the school district is available on their website at:

<http://www.wash.k12.ut.us>

A survey was completed by a representative from WCSD during the Dixie MPO Transportation Workshop. Based on information received, WCSD is a public agency that serves school-aged children and parents of school-aged children in Washington County. WCSD directly provides and/or sponsors education/training and transportation to local public schools on a fixed route. Transportation is restricted to school-aged children, however the school district does reimburse for some homeless transportation needs. Transportation funds are received through State and Federal Funds.

WCSD expressed concerns regarding being able to adequately meet the need for special medical appointments and other special needs for students. WCSD expressed interest, in special circumstances, of contracting to provide transportation service.

The Washington County School District is located at:

121 W Tabernacle
St. George, UT 84770

TABLE 3: DIXIE MPO: GENERAL INFORMATION ABOUT AVAILABLE TRANSPORTATION SERVICES – FROM WORKSHOP MEETING

Service Name	Service Area	Service Type	Description	Notes
Medicaid Pick Me Up	Statewide	Demand Response	Door-to-door service provided by Medicaid (available when physician's statement says client needs specialized service)	If household has a licensed vehicle, the client is not eligible for Pick Me Up service
VA Shuttle	St. George to Salt Lake City	Agency Operated Service Demand response	Medical trips for veterans to VA hospitals	24 hour notice required
Greyhound	One stop in St. George	Private-for-Profit Intercity Transportation Service	N/A	Considered an expensive transportation option
St. George Shuttle	St. George to Salt Lake City	Private-for-Profit Intercity Transportation Service	Transportation from St. George to SLC (stopping in Cedar City)	Considered an expensive transportation option
Salvation Army	N/A	Agency Operated Service Demand-Response	Operated and maintained by a local Salvation Army	Other faith based organizations in St. George offer similar services

DEMOGRAPHICS

The Dixie MPO area includes the urbanized and urbanizing areas of Washington County. According to the U.S. Census, communities within the Dixie MPO are among of the fastest growing areas in the entire country.

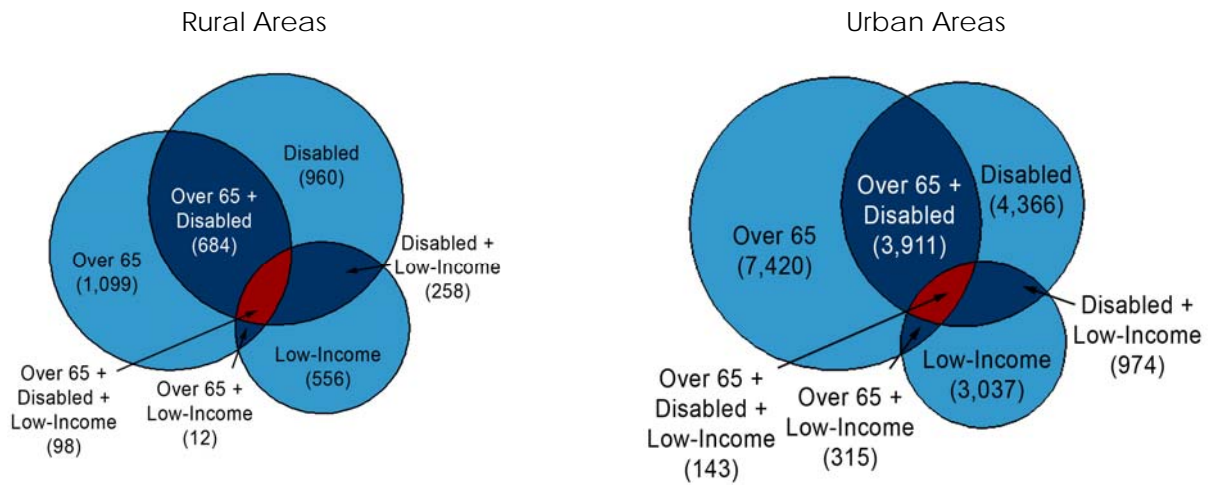
With over 67,000 residents in 2006, St. George, is not only the Washington County seat, but is also the county's largest city. The Dixie MPO interim planning area boundary (see Figure 1), had a 2006 population of 96,316. Rural areas included in the Dixie MPO planning boundary had a year 2006 population of 17,441. The combined total population for the Dixie MPO planning area was 113,757 in 2006. This represents a 7.2 percent average annual increase since the 2000 Census. Over the next four years, it is estimated that the population will grow by an annual average rate of 6.8 percent to a total population of 144,485. This significant growth rate is projected to continue at 5.5 percent between 2010 and 2020, and at 4 percent between 2020 and 2030 (see Table 4).

Detailed information about how the targeted population groups will change over the years is not available at the MPO level. However, census data from 2000 does provide a detailed look at each of segment of the targeted population, including the overlap between each of the three groups. Table 5 displays data from the census (Summary File Three, Table PCT 34) that breaks down the targeted population group into seven unique categories. These categories are depicted in a three-ring Venn diagram in Figure 3, which shows the overlap between each of the population groups.

The information supplied by the census was expanded to the years 2006, 2010 and 2020 using the 2006 estimate and the 2010 and 2020 projections from the GOPB. This data is presented for both rural areas and urban areas in Tables 6 and 7, respectively. The information shows an estimate of how the targeted population groups might grow over time. It is important to note,

however, that the data in these tables represents a simple expansion based on the percentage increases from Table 4. It does not account for dynamic changes that are likely to occur, such as the senior population growing at a faster rate than other population groups because of the aging baby boomer generation. To provide this dynamic perspective, Figure 4 shows how the Washington County senior population will grow between now and 2030. No data is readily available to depict dynamic changes in the low income or disabled population.

FIGURE 3: OVERLAP BETWEEN TARGETED POPULATION GROUPS: RURAL AREAS VS. URBAN AREAS



Source: U.S. Bureau of the Census, Census 2000

TABLE 4: POPULATION GROWTH RATE: AVERAGE ANNUAL RATE OF CHANGE

	2000	2006		2010		2020		2030	
	#	#	2000 – 2006 AARC	#	2006 – 2010 AARC	#	2010 – 2020 AARC	#	2020 – 2030 AARC
Rural Total	12,552	17,441	6.5%	21,553	5.9%	33,351	5.5%	46,753	4.0%
Urban Total	66,929	96,316	7.3%	122,932	6.9%	190,181	5.5%	266,716	4.0%
Grand Total	79,481	113,757	7.2%	144,485	6.8%	223,533	5.5%	313,469	4.0%

Sources: Governor's Office of Planning and Budget, 2006, 2010 & 2020 Population Estimates; Dixie MPO, LRTP 2030 Population Estimates

Notes:

AARC = Annual Average Rate of Change

TABLE 5: DIXIE MPO 2000 TARGETED POPULATION DEMOGRAPHICS

	Total Population	Over 65 Alone	Over 65 and Low Income	Over 65 and Disabled	Over 65, Low Income, & Disabled	Between 16 - 64 & Disabled	Between 16 - 64 & Low Income	Between 16 - 64, & Low Income, & Disabled	Total Targeted Population	Target as % of Total
Rural Total	12,552	1,099	12	684	98	960	556	258	3,667	29.2%
Hurricane	8,250	784	8	492	72	628	332	178	2,494	30.2%
La Verkin	3,392	226	4	166	23	284	158	57	918	27.1%
Toquerville	910	89	-	26	3	48	66	23	255	28.0%
Urban Total	66,929	7,420	143	3,911	315	4,366	3,037	974	20,166	30.1%
Ivins	4,450	320	10	186	8	383	112	41	1,060	23.8%
Santa Clara	4,630	281	2	138	10	203	74	6	714	15.4%
St. George	49,663	5,882	121	3,027	290	3,134	2,612	815	15,881	32.0%
Washington	8,186	937	10	560	7	646	239	112	2,511	30.7%
Grand Total	79,481	8,519	155	4,595	413	5,326	3,593	1,232	23,833	30.0%

Source: U.S. Bureau of the Census, 2000 Census

TABLE 6: DIXIE MPO YEARS 2006, 2010, AND 2020 TARGETED POPULATION DEMOGRAPHICS: RURAL AREAS

		Over 65		Low Income		Disabled		Total Population
		Total	% of Total Population	Total	% of Total Population	Total	% of Total Population	
2006	Hurricane	1,986	16.4%	864	7.2%	2,007	16.6%	12,084
	La Verkin	512	12.4%	296	7.1%	647	15.6%	4,142
	Toquerville	158	13.0%	123	10.1%	134	11.0%	1,215
	Rural Total	2,655	15.2%	1,283	7.4%	2,787	16.0%	17,441
2010	Hurricane	2,364	16.4%	1,029	7.2%	2,389	16.6%	14,385
	La Verkin	699	12.4%	404	7.1%	884	15.6%	5,657
	Toquerville	196	13.0%	153	10.1%	166	11.0%	1,512
	Rural Total	3,259	15.1%	1,585	7.4%	3,439	16.0%	21,553
2020	Hurricane	3,660	16.4%	1,592	7.2%	3,698	16.6%	22,268
	La Verkin	1,080	12.4%	624	7.1%	1,366	15.6%	8,741
	Toquerville	304	13.0%	237	10.1%	257	11.0%	2,343
	Rural Total	5,043	15.1%	2,453	7.4%	5,321	16.0%	33,351

Sources: U.S. Bureau of the Census, Census 2000; Governor's Office of Planning and Budget, 2006, 2010 & 2020 Population Estimates

Notes:

Year 2000 Census data was projected using growth factors from GOPB estimate.

TABLE 7: DIXIE MPO YEARS 2006, 2010, AND 2020 TARGETED POPULATION DEMOGRAPHICS: URBAN AREAS

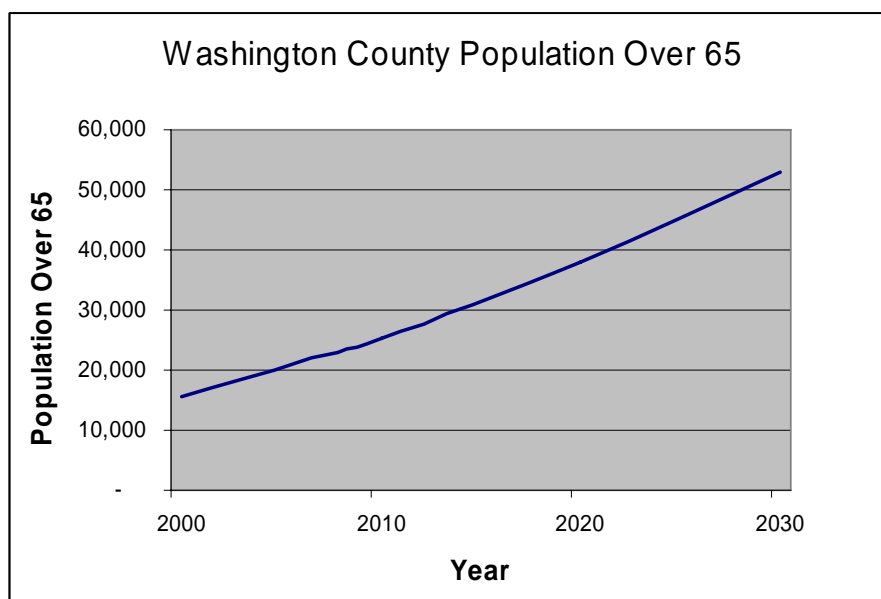
		Over 65		Low Income		Disabled		Total Population
		Total	% of Total Population	Total	% of Total Population	Total	% of Total Population	
2006	Ivins	848	11.8%	277	3.8%	1,001	13.9%	7,205
	Santa Clara	585	9.3%	125	2.0%	484	7.7%	6,280
	St. George	12,689	18.8%	5,225	7.7%	9,892	14.6%	67,614
	Washington	2,814	18.5%	684	4.5%	2,463	16.2%	15,217
	Urban Total	16,936	17.6%	6,311	6.6%	13,840	14.4%	96,316
2010	Ivins	1,081	11.8%	353	3.8%	1,275	13.9%	9,184
	Santa Clara	758	9.3%	162	2.0%	628	7.7%	8,143
	St. George	16,072	18.8%	6,619	7.7%	12,530	14.6%	85,644
	Washington	3,692	18.5%	897	4.5%	3,231	16.2%	19,960
	Urban Total	21,604	17.6%	8,031	6.5%	17,664	14.4%	122,932
2020	Ivins	1,673	11.8%	546	3.8%	1,973	13.9%	14,207
	Santa Clara	1,172	9.3%	250	2.0%	971	7.7%	12,595
	St. George	24,865	18.8%	10,240	7.7%	19,385	14.6%	132,497
	Washington	5,712	18.5%	1,388	4.5%	4,999	16.2%	30,882
	Urban Total	33,422	17.6%	12,424	6.5%	27,328	14.4%	190,181

Sources: U.S. Bureau of the Census, Census 2000; Governor's Office of Planning and Budget, 2006, 2010 & 2020 Population Estimates

Notes:

Year 2000 Census data was projected using growth factors from GOPB estimate

FIGURE 4: GROWTH IN WASHINGTON COUNTY SENIOR POPULATION



Source: Governor's Office of Planning and Budget

TABLE 8: GROWTH IN WASHINGTON COUNTY SENIOR POPULATION

Year	Population Over 65	AARC
2000	15,453	-
2006	21,489	6.5%
2010	25,406	4.6%
2020	37,867	4.9%
2030	52,894	4.0%

Source: Governor's Office of Planning and Budget

TRANSPORTATION NEEDS

This section summarizes the needs identified for the Dixie MPO. See Chapter 3: Methods for a description of how these needs were identified.

MEDICAL TRANSPORTATION

Need: There is need for expanded non-emergency medical transportation (NEMT) service.

Discussion: Comments received from the public forum noted while some services are available for transportation to medical appointments, expanded/improved services are needed to meet the medical needs of the targeted population (e.g. transportation to the dialysis center). Often family members and friends are unable to take members of the targeted population to medical appointments during the day as they work full-time. Subsequently individuals must wait until it is convenient for others before they can access the medical services they require. It was also noted that the Pick Me Up service will not provide medical transportation to a client if they have a vehicle registered in their name regardless of whether the individual still drives the vehicle. This policy becomes problematic for some clients, who maintain a vehicle for short trips, but are uncomfortable making long distance trips themselves. Restricting NEMT services to only those individuals who don't own a vehicle prohibits a large portion of potential riders from accessing the services.

Specialist services available in Salt Lake City are accessible via the St. George Shuttle or Greyhound; however workshop attendees indicated these are expensive transportation options and many members of the targeted population cannot afford to utilize this service. Expanded NEMT service is required both locally and regionally to meet the medical needs of members of the targeted population.

ACCESS TO SERVICES LOCATED ON THE OUTSKIRTS OF ST. GEORGE

Need: Expanded transportation services are needed to access businesses/services that relocate to the outskirts of St. George City.

Discussion: Due to the continued growth within St. George City many businesses/services are moving to the outskirts of the City or to nearby cities where operating costs (e.g. building leases) are less expensive and growth related issues (e.g. congestion) are less severe. As this trend continues and businesses/services become more geographically spread out it becomes increasingly harder for members of the targeted population to access the services they need.

EMPLOYMENT RELATED TRANSPORTATION

Need: Many major employers are located in the remote areas of Washington County where public transportation is unavailable. Transportation options outside of regular business hours (9:00 a.m. – 5:00 p.m., Monday – Friday) are limited. Transportation options are needed to allow

members of the targeted population to access employment opportunities in remote locations or that occur outside of regular business hours.

Discussion: The 400-acre Gateway Business Park located on I-15 and SR 9 in Hurricane is home to the 1.2 million square-foot Wal-Mart Distribution Center. Wal-Mart is considered the third largest employer in Washington County. Other major employers include the Fort Pierce Industrial Park (currently home to more than 50 local businesses) and Deseret Industries (located east of I-15 in Washington City). While offering significant employment opportunities for members of the targeted populations (disabled and low income), these and many other major employers are located in remote areas inaccessible to individuals who do not have access to private transportation. When an individual does not have a personal vehicle they must rely on alternative transportation such as carpooling or rides from friends and family to get to work. The ability to maintain permanent employment is hindered when these types of informal transportation methods are used. Affordable, regular public transportation options are needed to allow members of the targeted population access to these employment opportunities.

In addition to regular business hours, members of the targeted population need transportation options with extended operating hours to access employment opportunities occurring outside the regular workday such as graveyard shifts and weekend employment. Participants at the transportation workshop explained, often low income individuals and families are juggling work, education, and child rearing responsibilities, and access to flexible transportation is a necessity. By offering transportation options with extended operating hours, members of the targeted population would also be able to access recreational and religious activities that occur during the evenings and weekends.

LACK OF UNDERSTANDING ABOUT LIABILITY AND ELIGIBILITY

Need: Transportation service providers indicated coordination efforts are hindered by concern about liability risks and confusion about eligibility restrictions. Concerns regarding liability and eligibility need to be addressed to facilitate effective coordination efforts. Both service providers and members of the targeted population would benefit from education on these topics.

Discussion: When providing transportation services to members of the targeted population outside an agency's normal clientele, service providers are concerned about liability issues. For example, Washington County School District Vehicles are idle when not being used to transport students to and from school and during the summer months and in the mid-day and evening hours. However, service providers expressed valid concerns about liability issues associated with allowing other human-service agencies and members of the targeted population to utilize school district vehicles. Due to restricted funding, transportation service providers would benefit significantly by using volunteers to assist in the provision of services; however providers also expressed concern about fully utilizing this resource due to liability risks.

Both members of the targeted population and transportation service providers experience frustration determining eligibility restrictions and requirements for some transportation services and programs. Service providers expressed their fear about losing transportation funding as a result of coordination efforts. Representatives from SunTran noted many of their clients express frustration toward eligibility restrictions for services such as paratransit.

EDUCATION ABOUT AVAILABLE SERVICES AND ASSISTANCE

Need: Members of the targeted population and transportation service providers alike experience an overall lack of understanding about available transportation services and assistance programs. Education is needed to encourage utilization of existing services and to provide resources for effective transportation coordination efforts.

Discussion: Service providers highlighted a lack of understanding from members of the targeted population (and the general public) about existing public transportation services in Washington County. Service providers also acknowledged a lack of understanding about the multiple services available to their clients, which could be used to assist agencies in the provision of additional transportation services. There is also a general lack of understanding amongst service providers about funding and assistance programs, regulations, exceptions and information sources available to assist them with the provision of coordinated transportation services. Service providers need to be educated about the Federal Interagency Coordinating Council on Access and Mobility Vehicle Resource Sharing Final Policy Statement (see Appendix A), which states grant-recipients may “share the use of their own vehicles if the cost of providing transportation to the community is also shared.” This means agencies can coordinate transportation and provide services to all members of the targeted population without losing funding. Examples such as this highlight the need for education for both members of the targeted population and service providers to encourage utilization of existing resources and services.

POLITICAL SUPPORT FROM LOCAL ELECTED OFFICIALS

Need: Awareness about gaps in local public transit service on behalf of elected officials is needed.

Discussion: Service providers suggested the provision of public transportation is not well represented in political discourse. They feel gaps in the existing transportation system are not being brought to the attention of local decision makers, and therefore adequate funding is not being allocated to address the issues. Transportation coordination efforts would be more effective within Washington County if local decision makers/governing bodies were more aware of transportation needs and participated in efforts to provide these services. Participants at the transportation workshop explained transportation coordination efforts are fruitless without the participation and support from surrounding cities whose residents require access into the urban area of St. George City. During the Dixie MPO Transportation Workshop it was suggested that without first gaining political support, any strategy to address the transportation needs of Washington County will merely be a temporary solution to a permanent problem.

FUNDING FOR OPERATING EXPENSES AND SERVICE EXPANSION

Need: Additional funding is needed to cover operating and maintenance expenses and to provide service expansion.

Discussion: While many service providers use federally funded matching programs (e.g. The Elderly Individuals and Individuals with Disabilities Program (5310 Program)) for capital expenses and the purchasing of vehicles, providers noted they often do not have sufficient funds to cover operating and maintenance expenses or to expand services such as increasing routes or extending operating hours. For example, SunTran operates bus service throughout St. George from Monday to Friday 6:00 a.m. to 8:00 p.m. Monday through Friday and 8:00 a.m. to 6:00 on Saturdays; however it was noted that due to limited funding and low ridership numbers outside these hours, it is not financially feasible to extend the operating period.

Additionally, SunTran currently charges paratransit clients \$1 to use ADA accessible dial-a-ride service; however the actual cost is approximately \$12 per rider. On a limited budget SunTran cannot provide any additional services when existing services such as paratransit are not cost effective.

Service providers noted that local match funding is often difficult to obtain due to lack of knowledge about the programs by policy makers and the community. Local governments, agencies and programs all have limited budgets and funds are often only available for specific individual programs.

STRATEGIES TO ADDRESS NEEDS

Certain insights have been developed that help to launch a discussion about strategies to address the needs in the Dixie MPO area. The first insight is the interrelatedness of the needs and issues. For instance, workshop participants indicated that there is a need to expand transit services into growing portions of the urban and outlying areas. However, there is a lack of political support for expanding service into areas outside of St. George and also a lack of available funding. The issues of funding for expansion and garnering the necessary political support to generate the funds are inextricably related.

Similarly, participants stated that there is an unmet need for non-emergency medical transportation for essentially all members of the targeted population group. However, many agencies and clients expressed confusion about the eligibility requirements of the state's sole source provider for non-emergency medical trips in the Dixie MPO area. Again, the needs and issues are interrelated: There is a need for NEMT service, but there appears to be issues with the local understanding of how the system is intended to work.

In addition to these insights about interrelated needs and issues, the workshop discussion also generated insight into some opportunities. Particularly, the lack of understanding about liability and eligibility issues presents an opportunity to improve coordination by educating service providers and clients about these topics. In addition, the lack of familiarity about available funding sources and allowable uses for certain funds also presents an opportunity to increase education and coordination by providing agencies with the information they lack. New programs such as Job Access Reverse Commute are prime opportunities to address issues associated with employment growth in outlying areas. Similarly, strategies highlighted in the statewide section of this plan, including the proposed statewide education program and the designation of a Coordination Planning Position within each of the AOG's present additional opportunities to address the needs identified in the Dixie MPO area.

Interest in these insights and opportunities was felt at the transportation workshop. As the meeting came to a close there was a sense of energy and excitement in the room. The participating agencies expressed enthusiasm about the potential benefits of coordinating their services. During the last hour of the meeting, a number of ideas were discussed. The following section presents those ideas, which have been elaborated upon, organized and evaluated for prioritization. Other ideas are also presented, as gathered from examples of coordination found in relevant literature and other sources. Combined, the following strategies outline a course of action that will lead to an improved human service public transportation system through enhanced coordination in the Dixie MPO area.

STRATEGIES TO ADDRESS NEEDS

This section outlines proposed strategies addressing the needs identified above. Note that some strategies included in this section are related to strategies identified in the statewide section of Utah's Coordinated Human-Service Public Transportation Plan. In particular, these strategies assume that the Five County AOG will receive funds for a Coordination Planning Position, and

that the state will implement a statewide education program that supports education efforts within the Five County area, among the rest of Utah's AOG's.

Each strategy includes a discussion of the needs it addresses and identifies specific actions. The strategy also includes information for each of the three prioritization criteria identified in Chapter 3: Methods.

STRATEGY 1 – CONDUCT REGULARLY SCHEDULED HUMAN SERVICE PUBLIC TRANSPORTATION COORDINATION MEETINGS

Discussion: The individuals who attended the Dixie MPO transportation workshop expressed a level of excitement and interest that is critical to the success of a coordination program. To build on this enthusiasm, it is important to maintain the momentum generated by providing a regular forum for this group to gather, discuss coordination issues, and pursue the strategies they identified.

In addition to providing the momentum necessary to keep the coordination effort alive, a regularly scheduled meeting of a human service transportation coordination committee also presents an opportunity to bring the local elected officials into the fold by establishing a role for them within the committee.

Lastly, the human service transportation coordination committee would act as the working group that pursues the strategies outlined in this plan.

Recommendation: Five County AOG CPP to act as the initial committee chair. CPP organizes the first meeting, and prepares the first agenda. Meeting attendees initially discuss meeting format and develop a charter for the committee to be agreed upon by a majority of the standing committee members. The charter will include ground rules for how the committee operates including a statement about the mission of the committee, and information about how leadership of the committee is to be established.

Initially meetings will be held monthly. After a committee charter has been established through an initial set of meetings, as determined by the committee, the meeting frequency will shift to quarterly.

The objective of the committee is to pursue the strategies outlined in this plan, and to take on other activities as deemed necessary by the committee through development of a charter.

Currently, there are several committees established that address inter-agency coordination. There is a Human Services Coordination committee that meets regularly to discuss issues relating to the provision of human services in the Washington County area. This group does not specifically address transportation issues. Similarly, there is a Local Interagency Coordination Committee, or LIC that has been established for the area.

The proposed human service transportation coordination committee could be formed as a temporary sub-committee of either of these groups, or as a stand alone committee. However, it was suggested during the Dixie MPO transportation workshop that the LIC would not be an appropriate forum for addressing the issues of human service transportation.

If established as a standalone committee, members of the committee would include:

- 5 representatives from the Dixie MPO Transportation Workshop (see Table 1)
- 4-5 elected officials or senior level staff persons from each city within the Dixie MPO
- 1 active representative from the Dixie MPO board
- 1 – 2 active representatives from the existing Human Services Coordination Committee*
- 1 – 2 active representatives from the Local Interagency Coordination Committee

It is recommended that the CPP use discretion and apply an understanding of what would work best given the local circumstances in developing the actual composition of the committee.

To fund the human service transportation coordination committee it is recommended that the MPO utilize 5310, 5316 or 5317 funds. As stated in the application instructions, FTA Section 5310, 5316 and 5317 funds can be used for “support for short term management activities to plan and implement coordinated services,” and “support of State and local coordination policy bodies and councils.”

Prioritization Criteria:

- **Ease of Implementation:** With the CPP in place at the Five County AOG level, this strategy is relatively easy to implement. Some level of encouragement will be required to convince elected officials that the human service transportation coordination committee is worth the time spent. The CPP and volunteers from the Dixie MPO Transportation Workshop may need to educate local officials about the importance of the issues and the needs identified in this plan. Having this plan will help. Utilizing resources developed through the statewide education program will also help. Utilizing the available funding sources to support such a program will improve the ease of implementation.
- **Needs Addressed:** Because the human service transportation coordination committee will be responsible for implementing the other strategies in this plan, this strategy directly and indirectly meets essentially all of the needs identified for the Dixie MPO. In addition to meeting the needs already identified, the committee will also act as a means for identifying new needs and issues as they arise.
- **Position within Critical Path:** The success of many of the following strategies depends upon the implementation of this strategy. While many of the strategies identified below could be implemented without the human service transportation coordination committee in place, the committee serves the critical function of bring elected officials into the fold. This element makes it an early priority, with a position at the beginning of the critical path.

STRATEGY 2 – EDUCATE SERVICE PROVIDERS & LOCAL ELECTED OFFICIALS ABOUT THE BENEFITS OF COORDINATION, OPPORTUNITIES TO COORDINATE, AND ISSUES ASSOCIATED WITH COORDINATION

Discussion: Part of the need associated with improved political support is a need for understanding on behalf of local elected officials and decision makers about the issues associated with human service public transportation. An awareness of the local transportation

needs and the benefits of coordination would improve elected officials understanding of human service transportation issues, likely making them more open to considering the other types of strategies outlined in this plan.

Similarly, an improved understanding on behalf of the local service providers of the issues associated with liability, eligibility restrictions, funding programs and other available services would also lead to improved coordination. For example, while liability was expressed as a concern numerous times at the Dixie MPO transportation workshop, the literature suggests that in reality it is not a major obstacle to coordination. One state's coordinated plan indicates that if an agency approaches their insurance carrier with a well defined plan for how they wish to coordinate their services, the insurance carrier is often able to explain exactly how the insurance coverage will need to be modified. If the expanded services require expanded coverage, the cost must be covered. By establishing cost sharing agreements through the coordination process, however, such cost changes are easily overcome.

Service providers need to be educated about these matters. Education on available funds (e.g. RTAP, New Freedom, JARC, CTAP, and other sources) that makes the funding process simpler for local agencies to understand would improve the potential for coordination to occur dramatically.

Recommendation: Within the human service transportation coordination committee, assign an education task force of 4 – 5 individuals to identify key education topics needed for educating service providers and elected officials. Based on the areas needing the most education, coordinate with the UDOT Public Transit Team to obtain relevant information and materials to use in education efforts. Activities could potentially include:

- Presentations on funding programs such as Section 5310, 5316, 5317
- Presentations on key issues such as liability concerns and methods for overcoming them
- Team building exercises for fostering relationships between agencies
- Presentations on the findings of this plan to educate elected officials about the needs identified for the Dixie MPO area
- Presentations on the finer details of making coordination happen, covering topics such as cost sharing agreements, developing a coordination plan, memoranda of understanding, joint powers agreements, and other relevant topics.

Prioritization Criteria:

- Ease of Implementation: Funding for education programs is available through the RTAP program administered by UDOT. Ample materials and information should also be available through UDOT once the statewide human service public transportation coordination education program has been established. Nonetheless, this effort will require dedicated time and resources of the human service transportation coordination committee. Involvement of the CPP in the education task force will lighten the load of other task force members, but work will still be required of the other members. The ease of implementation depends on the amount of time the education task force members are willing to contribute. Implementation also depends on the success of the Statewide education program,

- Needs Addressed: As indicated in the introduction to this section, many of the needs are interrelated. A major factor in many of the needs is a lack of information. By providing the missing information in a targeted way, this strategy directly addresses:
 - o The need for political support
 - o The need for education about liability and eligibility restrictions
 - o The need for education about funding and available services

By educating elected officials and service providers on these topics, the potential for coordination to occur will improve dramatically. As agencies begin to coordinate, issues such as the need for funding for operations and maintenance and expansion, the need for non-emergency medical transportation, and other needs will begin to be addressed.

- Position within Critical Path: Because this strategy is part of the effort targeted at improving political support for coordination of human service transportation programs, it is recommended that it be placed early in the critical path. This strategy is best implemented when done so in conjunction with the human service transportation coordination committee, so it should follow the implementation of Strategy 1.

STRATEGY 3 – FACILITATE OPPORTUNITIES FOR SERVICE PROVIDERS TO POOL RESOURCES

Discussion: Both at the transportation workshop and in the survey, a number of agencies expressed interest in the opportunity to pool resources as a means for expanding transportation services. From an operations standpoint, sharing resources would involve individual contributions from service providers to a single operator. Contributions could be in the form of direct payments, or in the form of shifting designation for specific funding sources from one agency to another. Other forms of pooling resources include combined insurance programs, combined grant writing efforts, information sharing and vehicle sharing.

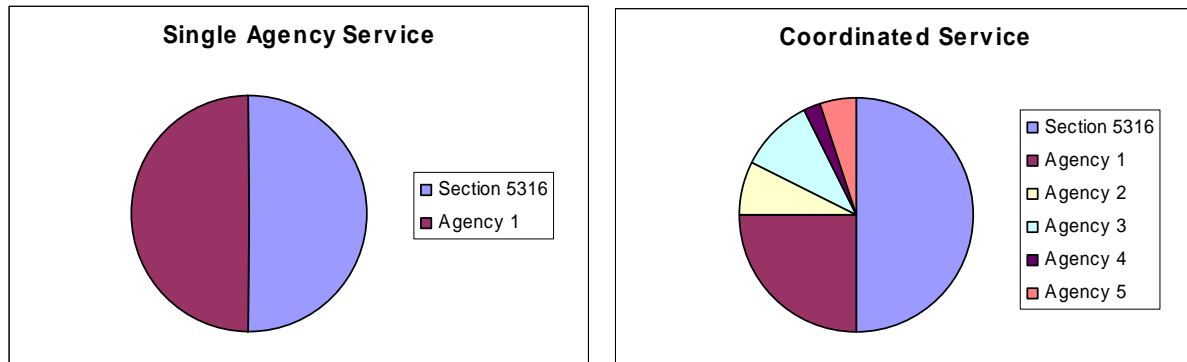
In addition, the Section 5310 program allows for “acquisition of transportation services under a contract, lease, or other arrangement. Both capital and operating costs associated with contracted service are eligible capital expenses.” This means that agencies currently struggling to obtain the operating funds for their 5310 vehicles could instead channel their 5310 capital to an agency that already has vehicles to pay for operations. This is unique to the 5310 program, and only available when used to acquire transportation service through a contract, lease or other arrangement as specified in the FTA Program Guidance and Application Instructions for the Elderly Individuals and Individuals with Disabilities Program.

Recommendation: Utilize the human service transportation coordination committee meetings as a forum for exploring opportunities for pooling resources. Consider establishing a sub-committee or task force to develop and execute a plan for pooling resources. The plan should identify the entities to be involved in the combined service, the scope of services offered, and the incremental costs for each agency’s customers (see the FTA Vehicle Sharing policy in Appendix A). This information will be useful in negotiations with insurance carriers to overcome the perceived liability barriers associated with an expanded service. The plan will also help to

outline the types of agreements that will be necessary and the accounting measures that will need to be put into place to implement the plan.

One benefit to pooling resources is that it allows agencies to leverage federal funding more effectively than when agencies operate independently. For example, if one agency applies for funds independently, that agency will be responsible for the full 50% local match required for operations funding. If multiple agencies apply for funds together, however, each individual agency will be responsible for a smaller portion of the local match. Although a combined service may be more expensive, the overall contribution from each participating agency will almost always be smaller when resources are pooled, compared to when agencies operate independently. Figure 5 illustrates this concept using Section 5316 federal funds as the example and assuming a different incremental cost from each of the five participating agencies.

FIGURE 5: LEVERAGING FEDERAL FUNDS THROUGH COORDINATION: SINGLE AGENCY SERVICE VS. COORDINATED SERVICE



Prioritization Criteria:

- **Ease of Implementation:** Funds from section 5310, 5316 and 5317 are available to pay for the short-term management activities associated with planning and implementing a coordinated service. The planning work associated with pooling resources is dependent upon the extent to which services are intended to be combined. More extensive proposals would benefit from professional guidance offered through programs such as the Community Transportation Assistance Project (CTAP), or the Rural Transit Assistance Program (RTAP). Consulting services for planning and legal council may also be required, depending upon the complexity of the proposal. Because funds are available for this type of work, however, the ease of implementation is improved.
- **Needs Addressed:** The consolidation of resources would enable agencies to free up capital and enhance existing programs. Human service agencies would be able to focus efforts on their human service programs, leaving transportation matters to partnering transportation agencies. Due to improved economies of scale, a consolidated service would be able to operate more efficiently, enabling an expansion of service. This strategy directly addresses the need for funds for operations.

- Position within Critical Path: This strategy requires planning work that would benefit from involvement of the human service transportation coordination committee. Members of the committee would also have a better awareness the increased potential that pooling resources creates for transportation in the community after having received education through implementation of Strategy 2. As such, it is recommended that this strategy follow closely behind, or be implemented in conjunction with Strategy 2.

STRATEGY 4 – DISCUSS NEMT SERVICES AND ISSUES WITH DIVISION OF HEALTHCARE FINANCING

Discussion: Non-emergency medical transportation (NEMT) was indicated as a need at the public forum, in surveys, and at the Dixie MPO transportation workshop. During these conversations, there were substantial misunderstandings on behalf of all parties about the regulations surrounding Utah’s Medicaid transportation contract (Pick Me Up). Some participants recommended that the state should reimburse 5310 operators with Medicaid money for providing NEMT services. Others suggested providing a discount on St. George Shuttle or Greyhound for intercity NEMT trips by subsidizing the service with Medicaid funds. These ideas – while possessing some merit – contradict the effort the state has made in establishing a sole-source provider for NEMT services, and highlights a lack of understanding about how the current NEMT service is intended to work.

Recommendation: Members of the human service transportation coordination committee should approach the Utah Division of Healthcare Financing (Medicaid) to discuss the needs identified in this plan and to learn about the intent of the state’s current contract for NEMT services. The Utah Division of Healthcare Financing should be invited to participate in coordination as a partner agency. Once dialogue has been established, the conversation should be approached from neutral, informal standpoint, focused on gathering and sharing information. Once the current NEMT service is better understood, the committee will have a basis from which to recommend and discuss options for improving the NEMT system.

Prioritization Criteria:

- Ease of Implementation: This strategy involves interagency coordination across jurisdictional lines. Such strategies have a wide range of ease or difficulty depending on the circumstances and parties involved. If approached from a neutral, informal and information gathering standpoint, this strategy will be much easier to implement. Confrontation should be avoided.
- Needs Addressed: This strategy is specifically targeted at the need for NEMT services. While this is just one need, it was raised in all outreach aspects of the planning process for the Dixie MPO area. It is therefore a fairly high priority need to address.
- Position within Critical Path: This strategy would benefit from the experience of the committee members after they have met several times to better understand what the gaps in NEMT service are, so they are prepared to express their concerns when meeting with the Division of Healthcare Financing. It is recommended that this strategy be implemented as a short term goal following implementation of Strategies 1 and 2.

STRATEGY 5 – EXPLORE OPPORTUNITIES TO UTILIZE JARC AND NEW FREEDOM FUNDS TO EXPAND EXISTING FIXED ROUTE AND PARATRANSIT SERVICES

Discussion: A variety of ideas were proposed to address the need for transportation to outlying areas. These include ideas such as providing a van to go to the Deseret Industries facility on the outskirts of St. George proper, supporting vanpooling for shifts workers / day workers at the industrial park, and mobilizing donated vehicles to serve these areas.

The need for expanded service to locations that are currently outside of the SunTran service area raises an opportunity to utilized new funding sources such as JARC (Section 5317) and New Freedom (Section 5316). According to the FTA Program Guidance and Application Instructions for JARC (Job Access Reverse Commute) and New Freedom there are a number of eligible expenses that would help to meet the need for expanded service in the Dixie MPO area. Below is a sampling of eligible expenses from both New Freedom and JARC:

JARC:	New Freedom:
<ul style="list-style-type: none"> - Late-night and weekend service - Guaranteed ride home service - Shuttle service - Expanding fixed-route public transit routes - Demand-responsive van service - Ridesharing and carpooling activities - Transit-related aspects of bicycling - Local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides - Promotion, through marketing efforts, of the use of transit by workers with non-traditional work schedules and use of transit voucher programs by appropriate agencies for welfare recipients and other low-income individuals - Otherwise facilitating the provision of public transportation services to suburban employment opportunities 	<ul style="list-style-type: none"> - Expansion of paratransit service parameters beyond the three-fourths mile required by the ADA - Expansion of current hours of operation for ADA paratransit services that are beyond those provided on the fixed-route services - The incremental cost of providing same day service - The incremental cost of making door-to-door service available to all eligible ADA paratransit riders, but not as a reasonable modification for individual riders in an otherwise curb-to-curb system - Enhancement of the level of service by providing escorts or assisting riders through the door of their destination - Supporting the administration and expenses related to new voucher programs for transportation services offered by human service providers - Supporting new volunteer driver and aide programs

Further support is provided by JARC and New Freedom for Mobility Management activities that include, in part:

- The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals
- Support for short term management activities to plan and implement coordinated services
- The support of state and local coordination policy bodies and councils
- The operation of transportation brokerages to coordinate providers, funding agencies and customers
- The provision of coordination services, including employer-oriented Transportation Management Organizations' and Human Service Organizations' customer-oriented travel navigator systems as well as neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers

- The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs
- Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems (acquisition of technology is also eligible as a stand alone capital expense)

Recommendation: Through the human service transportation coordination committee, refine ideas for expansion of service, and identify key projects for JARC and New Freedom funds. Develop a brief, but concise plan for the proposed service(s), and coordinate with UDOT to pursue the funding.

Prioritization Criteria:

- **Ease of Implementation:** The human service transportation coordination committee will be well situated for further discussing needs and refining ideas for expanding services. Effort will be required to develop plans for potential JARC and New Freedom projects, but as described above, both JARC and New Freedom funds can be used to develop such plans.

JARC and New Freedom operations grants require a 50% match. Securing the match for the operations portion will be the most difficult aspect of this strategy. All of the local match must be from non-Department of Transportation federal sources. This may cause some concern on behalf of decision makers and operators. The human service transportation coordination committee members involved with pursuing the JARC and New Freedom funds will need to exercise creativity in identifying local match options to stem the concern associated with generating the funds locally. Examples of local match include state or local appropriations; other non-DOT Federal funds; dedicated tax revenues; private donations; revenue from human service contracts; toll revenue credits; and net income generated from advertising and concessions. Non-cash share such as donations, volunteer services, or in-kind contributions is eligible to be counted toward the local match as long as the value of each is documented and supported, represents a cost, which would otherwise be eligible under the program, and is included in the net project costs in the project budget. The human service transportation coordination committee should engage the business community as a partner in the coordination process and as a potential contributor to the local 50% match. Coordination with human service providers, and a broad look at other coordination opportunities (such as Strategy 3, above) may also provide ideas for sources of local match.

- **Needs Addressed:** Expanded services would address the need for new service in growing and outlying portions of the Dixie MPO area. This need was expressed in many of the surveys collected, and was also a common theme heard during the Dixie MPO transportation workshop.
- **Position within Critical Path:** The opportunity presented by JARC and New Freedom funds to address the needs associated with growth and lack of service in the Dixie MPO area

make this strategy an appealing strategy for early implementation. However, the grants are competitive, and require significant lead times and planning efforts. In addition, the local match will require some creative identification of supplemental funding sources on behalf of the committee members. It is recommended that such efforts would benefit from being implemented after the human service transportation coordination committee is established.

STRATEGY 6 – ESTABLISH A RURAL PLANNING ORGANIZATION

Discussion: Discussions between the Five County AOG and UDOT have begun regarding the establishment of an RPO in the Washington County Area. The current plan is for a three-tier approach, with an RPO initially being developed to address planning issues in Washington County, outside of the MPO boundaries. Later the RPO would be expanded to Cedar City, then in the third tier to Beaver County.

An RPO would provide a forum for rural areas that are outside of the MPO to begin addressing transportation issues. Agencies also expressed a need to become familiar with city and county plans for future land use expansion. An understanding of where growth will occur will help transportation agencies plan for expansion of services. Currently this dialogue is facilitated by the MPO for the urban cities of St. George, Ivins, Santa Clara, Washington, Hurricane, La Verkin and Toquerville, but not for other cities outside of the MPO boundary. And RPO would facilitate a discussion about growth outside of the MPO.

Recommendation: Members of the human service transportation coordination committee should be aware of the plans associated with developing and RPO, and potentially appoint a person to routinely contact the RPO sponsors. The contact person would keep the human service transportation coordination committee apprised of new developments associated with the RPO. The human service transportation coordination committee would not be directly involved in forming the RPO. Once the RPO is established however, it is recommended that a representative from the RPO be added to the human service transportation coordination committee.

Prioritization Criteria:

- **Ease of Implementation:** Five County AOG will be the champion to establish the RPO. Although the creation of an RPO will require buy in from cities and UODT, this is not something that the human service transportation coordination committee will be responsible for. The support role envisioned for the human service transportation coordination committee will be easy to implement.
- **Needs Addressed:** The RPO will provide a forum for addressing long term planning needs associated with human service transportation coordination in outlying areas of Washington County.
- **Position within Critical Path:** This strategy supports long term planning. No short term strategies are dependent upon an RPO being established.

STRATEGY 7 – ESTABLISH A REGIONAL TRANSIT AUTHORITY

Discussion: It was suggested at the Dixie MPO transportation workshop that a long-term goal for agencies and cities in the Dixie MPO area is to establish a regional transit authority. This goal would reduce the inter-jurisdictional funding issues associated with transportation being funded at the municipal level, as this is currently the case. It would also allow for improved economies of scale. As a single provider, it would have lower overhead than multiple providers serving the same geographic region would.

Recommendation: Within the next three – five years, create a regional transit authority that serves a logical region centered on St. George with connections to rural communities in the surrounding area.

Prioritization Criteria:

- **Ease of Implementation:** This idea requires political support. It may also require a dedicated tax for transit. However, since it is recommended as a long term strategy, the other strategies identified above will have an effect on public and elected officials' opinions of transit. These strategies may improve the long term feasibility of establishing a transit authority for the Dixie MPO and surrounding areas.
- **Needs Addressed:** A regional transit authority would address the need for funding for operating expenses by establishing a dedicated and authorized funding source for public transit. The strategy is broader than human service transportation, and addresses needs that are beyond the scope of the human service focus of this document and current effort.
- **Position within Critical Path:** This strategy is a long term strategy that should be implemented after the immediate and short term strategies identified above have been successfully implemented.

PRIORITIES

A ranking of immediate, short term and long term has been given for each of the strategies based on the evaluation of each of the three criteria (see chapter 3 for additional details):

- Ease of Implementation
- Needs Addressed
- Position within Critical Path.

Ease of Implementation: Strategies relatively easy to address received a higher priority than those that require substantial dedication of resources or are difficult to complete because they address complex issues.

Needs Addressed: Strategies addressing multiple needs were prioritized higher than those that address fewer needs.

Position within Critical Path: Strategies received a higher priority if they are positioned early on the critical path. This mean if a strategy must be implemented before other strategies can be implemented, it receives a higher priority.

The prioritization rankings given are fairly subjective and are based on professional judgment applied by the practitioners involved in developing the plan. These priorities are simply recommendations, not requirements. Dixie MPO should interpret these recommendations with an understanding of the context of local conditions.

IMMEDIATE GOALS (HIGH)

Strategy 1 – Conduct regularly scheduled Human Service-Public Transportation Coordination Meetings

Strategy 2 – Educate service providers and local elected officials about the benefits of coordination, opportunities to coordinate, and issues associated with coordination

SHORT TERM GOALS (MEDIUM)

Strategy 3 – Facilitate opportunities for service providers to pool resources

Strategy 4 – Discuss NEMT services and issues with statewide provider

Strategy 5 – Utilize JARC funds to expand existing Fixed Route services to outlying employment and service centers

LONG TERM GOALS (LOW)

Strategy 6 – Establish a Rural Planning Organization

Strategy 7 – Establish a Regional Transit Authority

APPENDICES

APPENDIX A: COORDINATION TOOLBOX

The coordination toolbox is designed to give MPO staff, human service providers, and decision makers practical tools to coordinate transportation service in the Dixie MPO area. The tool box contains:

- Examples of interagency agreements and other legal templates relating to coordination
- CCAM Final Policy Statement on Coordinated Human Service Transportation Planning
- CCAM Final Policy on Vehicle Resource Sharing

EXAMPLE DOCUMENTS

These are examples of the types of legal documents that can be developed between transportation providers and coordinating agencies to assist in overcoming legal and administrative hurdles associated with coordination. These documents were taken from the Toolkit for Rural Community Coordinated Transportation Services (TRCP 101), developed by the Transportation Cooperative Research Program. The inclusion of this material does not imply endorsement of a particular product method or practice from Transportation Research Board, AASHTO, Federal Highway Administration, Transit Development Corporation, Federal Transit Administration, Federal Aviation Administration, or Federal Motor Carriers Safety Administration.

CCAM FINAL POLICY ON COORDINATED HUMAN SERVICE TRANSPORTATION PLANNING

The Federal Interagency Coordinating Council on Access and Mobility's (CCAM) final policy statement on coordinated human service transportation planning explains that federal grant recipients involved in providing and funding human service transportation need to plan collaboratively to more comprehensively address the needs of the populations served by federal programs.

CCAM FINAL POLICY ON VEHICLE RESOURCE SHARING

The Federal Policy on Vehicle Resource Sharing explains that many federal grant recipients mistakenly assume that vehicles cannot be shared because of program eligibility requirements. For example, out of fear of violating federal eligibility requirements some grant-recipients do not permit vehicles and rides to be shared with other federally-assisted program clients or with other members of the riding public. The policy guidance clarifies that federal cost principles do not restrict grant-recipients to serving their own clients. On the contrary, applicable cost principles enable grant-recipients to share the use of their own vehicles only if the cost of providing transportation to the community is also shared. This maximizes the use of all available transportation vehicles and facilitates access to community and medical services, employment and training opportunities, and other necessary services for persons with disabilities, individuals with low-income, and senior citizens.

EXAMPLE DOCUMENTS

SAMPLE MEMORANDUM OF UNDERSTANDING

MEMORANDUM OF AGREEMENT BETWEEN [Party One] and [Party Two]

Background:

The [Party One], hereinafter referred to as [], and [Party Two], hereinafter referred to as [], have many common interest and currently work together in a number of areas, including the provision of transportation services to the citizens/customers in one of the five counties of the [Party One] service area of [state]. We share common interest and both have unique roles and responsibilities. Through this agreement both agencies express their intent to collaborate and coordinate through utilization of data collection, planning strategies, and program design techniques to ensure efficient use of transportation resources and coordinated access to services.

Purpose:

The purpose of this memorandum is to establish a basic framework for collaboration, cooperation and coordination between [Party One] and [Party Two] in the planning and implementation of a pilot Coordinated Transportation System, hereinafter referred to as CTS, Which will enable identification and selection of a system for coordination and delivery of transportation services.

Objectives:

1. To explore methods that will allow for data collection and analysis and develop procedures required for implementation of a coordinated transportation system.
2. To assist the members of the Coordination Consortium in determining the cost feasibility of coordination within their respective service community.
3. To provide mechanisms for the integration of services provided by other community providers to ensure a comprehensive coordinated service delivery system.
4. To maintain the integrity of each human service provider's mission while enhancing specialized support services contributing to that mission.

Methods:

1. To develop efficient routing alternatives, reduce duplication of routes and overlapping of service schedules, and generate necessary resources for successful implementation of the project.
2. To continue collaboration to maintain awareness of needs and revision to project.
3. To share information and resources to support the success of a coordinated service delivery system.
4. To establish a network of transportation providers to monitor and evaluate the success of a coordinated service delivery system.
5. To safeguard the quality of services expected by agency administrators and customers to ensure that needs of customers are kept at the forefront of the project.

6. To evaluate the effectiveness of the coordinated transportation project and report finding to Consortium members and the [state] Department of Transportation.

The undersigned agree to uphold the terms of this agreement for the period of time that the project is being administered. Once an acceptable and cost effective system is identified by consensus agreement among the active participants, each participating organization will be free, subject to the will of its policy board, to elect active participation in the project.

EXECUTIVE DIRECTOR
[PARTY ONE]

EXECUTIVE DIRECTOR
[PARTY TWO]

SAMPLE AGREEMENT OF COOPERATION BETWEEN THE TRANSPORTATION OPERATOR AND THE BOARD OF COUNTY COMMISSIONERS

This Agreement is entered into by and between the Transportation Operator (TO) and the Board of County Commissioners (BCC), for the County Department of Human Services (CDHS). This Agreement is for the purpose of meeting the transportation needs of the CDHS's TANF participants and other persons receiving CDHS services through the County Transportation Coordination (CTC) program.

1. **Whereas**, the BCC created the County Transportation Coordination Coalition and the Transportation Coordination Steering Committee to improve transportation services in County through coordination of available transportation services, and
2. Whereas, the BCC has empowered the Transportation Coordination Steering Committee to set policy and oversee the implementation of coordinated transportation services, and
3. Whereas, the Transportation Coordination Steering Committee has adopted a Service Plan for Transportation Coordination, and
4. Whereas, the TO is the lead agency in County for the implementation of coordinated transportation services, and
5. Whereas, the CDHS wishes to meet its transportation needs through the CTC with TO as the lead agency for implementation of these transportation services, and

Responsibilities of the TO

The TO will have the following responsibilities:

- a) Ensuring that only persons determined to be eligible by CDHS will receive transportation services paid for by CDHS.
- b) Ensuring that transportation providers under contract to TO meet or exceed the service standards established by CDHS.
- c) Scheduling all passenger trips in a coordinated manner with the transportation requirements of other participating agencies so that transportation services are shared operated in the most cost-effective and cost-efficient manner.
- d) Reporting to CDHS the appropriate information, including but not limited to trips and TANF participants, which CDHS requires for its county, state, and federal reporting requirements.
- e) Submitting to CDHS invoices for services provided supported by information CDHS requires to ensure that the services it purchases are for persons eligible under the CDHS/TA agreement.

Responsibilities of CDHS

The CDHS will have the following responsibilities:

- a) Establishing the service standards that TO will be required to meet in providing transportation services to CDHS so that CDHS is able to meet its program requirements.

- b) Establishing the eligibility of its clients for specific transportation services.
- c) Working with TO to determine, on a trip by trip basis, if fixed route service can be used to meet a travel need.
- d) Working with TO to see that eligible clients for whom SST service is the best option are registered for SST service.
- e) Ensuring that CDHS clients know that they must contact TO to schedule SST service and should contact TA for information they may need to use fixed route service.
- f) Providing information to TO on the transportation eligibility status of its clients.
- g) Purchasing tickets or passes for CDHS client use of TA fixed route services.

INSERT STANDARD TERMS AND CONDITIONS:

Effective Date for the Start of Transportation Services

Cost of Transportation Services and Budget

Reporting Requirements

Invoicing and Payment

Term of the Agreement

Amendments to the Agreement

Termination of the Agreement

Entered into on this date _____ by and between:

**SAMPLE AGREEMENT FOR
COORDINATED TRANSPORTATION SERVICES
BETWEEN THE TRANSIT AUTHORITY
AND LOCAL BUS SERVICES, INC.**

THIS AGREEMENT, entered into this _____ day of _____, by and between the Transit Authority (hereafter, “TA”), acting as Lead Agency (hereafter, “LA”) for the County Transportation Coordination (hereafter, “MCTC”), under authority granted by and through the County Commissioners (hereafter, “Commissioners”), and Local Bus Services, Inc. (hereafter, “LBS”), a private for-profit corporate entity in the business of providing transportation management and operation services engaged by TA to provide such services for eligible passengers, as determined by the LA acting as Service Provider.

WHEREAS, TA desires to provide transportation services for the County Department of Human Services; and

WHEREAS, TA and the Board of County Commissioners have entered into an agreement for provision of these transportation services by TA; and

WHEREAS, LBS has the management, technical, and operating personnel and equipment useful for operating such paratransit service within [] County, [STATE], as directed by and in cooperation with TA; and

WHEREAS, LBS hereby certifies that it has the requisite licenses and certifications of authority under the laws of the State of Ohio to legally operate paratransit service under TA sponsorship;

NOW, THEREFORE, IN CONSIDERATION OF THE COVENANTS AND AGREEMENTS SET FORTH HEREIN, IT IS AGREED AS FOLLOWS:

- I. **System Operation.** LBS shall manage and operate transportation services for TA as required by TA herein, within the TA service area. LBS shall provide and conduct the service as specified in TA’s Request for Qualifications and Letters of Interest and Request for Proposals (Attachment A hereto) and as described in LBS’s Technical Proposal (Attachment B hereto). Further, LBS agrees to procure and manage service on behalf of TA as described in Attachment B.
- II. **Compliance.** Funds received by TA and provided to LBS in performance of all services contracted for herein shall be utilized in accordance with all applicable Federal, State and local laws and regulations and with all applicable County regulations, policies and procedures and attached appendices, included by reference herein. LBS shall comply with all requirements imposed upon TA by the Federal Government or the State of _____ if funding is received by TA under contract with the Federal government or the State of _____. Where this Agreement conflicts with said laws, regulations, policies and procedures, the latter shall govern. This Agreement is subject to modification by amendments to such applicable laws and regulations. In the event of any non-compliance, TA reserves the right to make use of any and all remedies specified under

this Agreement, and further reserves the right to require from LBS reasonable assurance that its decisions are being followed.

III. **Equipment.** LBS may be required to provide vehicles and equipment for the purpose of operating this paratransit service except as may be otherwise provided herein.

IV. **Duties and Responsibilities of LBS.** LBS shall provide the management, dispatching, technical, and operations services necessary for operating coordinated transportation services, including, but not limited to, the following:

- A. Trip reservations, scheduling, and dispatching of paratransit and other services.
- B. Operation and maintenance of vehicles.
- C. Management and administration of services.
- D. Integration with TA fixed route service.
- E. Cooperation with TA in developing contracts with other transportation service providers.
- F. Cooperation with TA in developing contracts with local agencies purchasing transportation services.
- G. Monitoring, evaluation, and periodic reporting of financial, operating, and service performance against established performance criteria.
- H. Reporting as required by TA and all agencies receiving transportation services that they need to meet all applicable Federal, State of Ohio, County and other local reporting requirements.
- I. Provision and supervision of qualified personnel, including, but not limited to, drivers, dispatchers, schedulers and administrative staff.
- J. Maintenance and repair of all LBS-owned and LBS-leased vehicles used in operating service provided through this Agreement.
- K. Registration of persons eligible for receiving service.
- L. Marketing, education, and community outreach in support of transportation services as directed by and in cooperation with TA.
- M. Administrative services required to assure TA that ridership, costs, and fares associated with each passenger is documented, controlled and verifiable as supporting LBS reports to TA.
- N. Ensuring that only persons determined to be eligible by TA and participating agencies receive transportation services hereunder for which such agencies are required to pay.
- O. Ensuring that transportation providers under contract to TA and LBS meet or exceed applicable service standards established by TA and other participating agencies.
- P. Scheduling all passenger trips, determining which transportation provider will transport which clients on a shared-ride basis with other passengers using the service.

All services provided by LBS under this Agreement shall be subject to the control of TA through designated staff and/or agents. LBS shall advise TA and make recommendations;

however, final authority shall rest with TA. LBS shall coordinate and consult with TA before the start of operations, and for training, evaluation, and monitoring. Relevant personnel policies, hiring and firing procedures, and accounting procedures of LBS shall be provided to TA upon request.

- V. **Duties and Responsibilities of TA.** TA and other participating agencies shall be responsible for:
- A. Establishing service standards that the service contractor shall be required to meet in providing transportation services.
 - B. Establishing the eligibility of clients for specific transportation services.
 - C. Working with LBS to determine, on a trip by trip basis, if fixed route service can be used to meet a travel need.
 - D. Working with LBS to see that eligible clients for whom SST service is the best option are registered for SST service.
 - E. Ensuring that participating agency clients are aware that they must contact the service contractor to schedule transportation service and contact LBS for information that may be needed to use fixed route service.
 - F. Providing information to LBS on the transportation eligibility status of its clients.

Standard Terms and Conditions

- VI. Insurance.
- VII. Audit and Inspection.
- VIII. Operating and Fiscal Records.
- IX. Required Reports.
- X. Conflict of Interest.
- XI. Copyrights.
- IX. Immigration Control and Reform Act of 1986. Property and Supplies.
- X. Confidentiality.
- XI. Non-Discrimination.
- XIII. Prohibition Against Assignment.
- XIII. Contract Modification and Termination.
- XIV. Notices.
- XIX. Indemnification.
- XX. Term of Agreement.
- XXI. Compensation.
- XXII. Attachments to the Agreement.

IN WITNESS WHEREOF, the parties have heretofore executed this Agreement the date first above written.

**OUTLINE OF
MODEL JOINT POWERS AGREEMENT
TO COORDINATE TRANSPORTATION SERVICE**

**JOINT EXERCISE OF POWERS CONSORTIUM AGREEMENT FOR
(INSERT NAME OF PROGRAM)**

THIS AGREEMENT is entered into this *INSERT DATE* by and between the *LIST NAME OF AGENCY* and *LIST NAME OF AGENCY* (hereinafter referred to as “member agencies”).

WITNESSETH

WHEREAS, the member agencies provide public transit services in the Counties of _____; and

WHEREAS
LIST ADDITIONAL CIRCUMSTANCES LEADING TO THE DECISION TO ENTER INTO THIS AGREEMENT

NOW, THEREFORE, IN CONSIDERATION OF THE FAITHFUL PERFORMANCE OF THE TERMS, CONDITIONS AND PROMISES IN THIS AGREEMENT, THE MEMBER AGENCIES AGREE AS FOLLOWS:

Article 1. Name and Purpose

- a. The name of this Consortium is _____.
- b. The purpose of this Agreement is to *LIST PURPOSES*.

Article 2. The Lead Agency

The responsibility to act as the Lead Agency under this Agreement shall rotate between the member agencies beginning with each fiscal year, other than the first fiscal year this Agreement is in effect. This rotation of responsibility shall remain in effect until this Agreement is terminated.

NAME OF AGENCY shall serve as the Lead Agency from the effective date of this Agreement until the end of the *INSERT YEAR* Fiscal Year.

Article 3. Scope of Services.

The Lead Agency shall provide the following services:

THE FOLLOWING ARE SOME EXAMPLES OF SCOPE THAT MIGHT BE INCLUDED HERE.

- a. Solicit the services of a Project Manager
- b. Solicit and oversee the services of legal counsel
- c. Oversee the activities of the Project Manager;
- d. Prepare a budget for the succeeding fiscal year;
- e. Apply for and oversee the administration of all forms of applicable grants or revenues
- f. Provide staff support necessary to carry out the Plan
- g. Work with the Service Review Committee and the Project Manager to bring issues to the member agencies which require their determination.
- h. Account for all funds and report all receipts and disbursements
- i. Conduct and file an annual audit
- j. Nothing in this agreement shall prohibit the Lead Agency from contracting for the provision of any or all of the services
- k. Collect and report service data used to determine costs sharing by the member agencies

Article 4. Project Manager.

The Project Manager shall be responsible for administering the Plan on behalf of the member agencies, under the direction and control of the Service Review Committee. The duties of the Project Manager, which may be changed from time to time, include, but are not limited to, the following:

THE FOLLOWING ARE SOME EXAMPLES OF DUTIES THAT MIGHT BE INCLUDED HERE.

- a. Prepare an annual budget and financial report
- b. Investigate the availability of and apply for grants, funds and other sources of revenue to fund the Plan's activities;
- c. Account for all revenues and expenditures;
- d. Serve as a liaison between the member agencies and customers, and other local and regional agencies.

- e. Notice and record all meetings and activities;
- f. Provide customer services;
- g. Coordinate the preparation of the annual plan update.

Article 5. Indemnification.

INCLUDE STANDARD INDEMNIFICATION LANGUAGE

Article 6. Compensation.

The expenses to be borne by the agency members for carrying out the Plan shall be determined as follows:

- a. The Lead Agency shall be credited for in-kind services provided in the performance of the services identified in Article 1.
- b. *DESCRIBE COST-SHARING AGREEMENTS*

Article 7. Service Review Committee.

- a. Purpose. The Service Review Committee shall provide direction to the Lead Agency and the Project Manager.
- b. Membership.
- c. Required Votes; Approvals.
- d. Quorum.
- e. Minutes.
- f. Budget.

Article 8. Termination/Withdrawal.

- a. Individual Member Withdrawal
- b. Complete Dissolution.

Article 9. Disposition of Money and Property.

Article 10. Miscellaneous.

- a. Term of Agreement.
- b. Amendment.
- c. Additional Members.
- d. Dispute Resolution.
- e. Successors.
- f. Severability.

IN WITNESS WHEREOF, the parties hereto have executed this AGREEMENT by authorized officials on the dates indicated below:

NAME OF AGENCY

By: _____ General Manager

DATE:

NAME OF AGENCY

By: _____, General Manager

DATE:

DETAILED VERSION OF MODEL JOINT POWERS AGREEMENT

JOINT EXERCISE OF POWERS TRANSPORTATION CONSORTIUM AGREEMENT FOR_ (INSERT NAME OF PROGRAM)

This Agreement is entered into this INSERT DATE by and between the LIST NAME OF AGENCY and LIST NAME OF AGENCY (hereinafter referred to as “member agencies”).

W I T N E S S E T H

WHEREAS, the member agencies provide public transit services in the Counties of INSERT LOCATIONS; and

WHEREAS, the member agencies provide fixed route public transit services, and, pursuant to the Americans with Disabilities Act of 1990 and 49 CFR Part 37 (the Law), are required to provide complementary paratransit service to persons unable to use the fixed route system; and

WHEREAS, the member agencies cooperatively prepared a “Coordinated Paratransit Plan” dated INSERT DATE (the Plan); and

WHEREAS, the Boards of Directors of the member agencies adopted the Plan and update; and

WHEREAS, the Federal Transit Administration of the United States Department of Transportation has determined that the Plan is in compliance with the Law; and

WHEREAS, the Plan and update contemplated implementation of its provisions through the cooperative efforts of the member agencies; and

WHEREAS, Government Code Section INSERT STATE CODE NUMBER, et. seq., authorizes the member agencies to enter into an agreement for the joint exercise of any power common to them, which includes the power to contract for and or operate paratransit services.

NOW, THEREFORE, IN CONSIDERATION OF THE FAITHFUL PERFORMANCE OF THE TERMS, CONDITIONS AND PROMISES IN THIS AGREEMENT, THE MEMBER AGENCIES AGREE AS FOLLOWS:

Article 1. Name and Purpose

- a. The name of this Consortium is INSERT NAME.
- b. The purpose of this Agreement is to develop, implement and administer the ADA paratransit services identified in the Plan.

Article 2. The Lead Agency

The responsibility to act as the Lead Agency under this Agreement shall rotate between the member agencies beginning with each fiscal year, other than the first fiscal year this Agreement is in effect. This rotation of responsibility shall remain in effect until this Agreement is terminated.

NAME OF AGENCY shall serve as the Lead Agency from the effective date of this Agreement until the end of the (INSERT YEAR) Fiscal Year.

Article 3. Scope of Services.

The Lead Agency shall provide the following services:

- a. Solicit the services of a Broker and Project Manager to provide the paratransit services required by the Plan, in accordance with applicable federal and/or state laws and regulations affecting the member agencies, and to perform the duties identified in this Agreement. These solicitations shall include, but not be limited to, scope of services, including the solicitation of Service Providers, and insurance coverage and indemnification by the Broker, service providers and Project Manager. The solicitation shall make it clear that the insurance of the Service Provider, Broker and Project Manager shall be primary in any loss. No insurance coverage or self-insurance of the member agencies shall be called upon in the event of an occurrence.
- b. Solicit (when appropriate) and oversee the services of legal counsel (in-house or outside counsel as necessary) to file or defend a suit brought by third parties against the member agencies for any activities related to or arising under this Agreement, with the designated counsel taking the role as lead counsel throughout the litigation;
- c. Oversee the activities of the Broker and Project Manager;
- d. Be responsible for the administration of the terms of this Agreement, including the preparation of a budget for the succeeding fiscal year and submitting it to the member agencies for approval;
- e. Apply for and oversee the administration of all forms of applicable grants or revenues to fund the paratransit activities contemplated by the Plan.

- f. Provide staff support necessary to carry out the Plan on behalf of all member agencies, but not for any activity that is the sole responsibility of one of the member agencies.
- g. Work with the Service Review Committee, the Broker and the Project Manager to bring issues to the member agencies which require their determination.
- h. Account for all funds and report all receipts and disbursements under this Agreement in accordance with generally accepted accounting principles.
- i. Conduct and file an annual audit in accordance with Government Code Section INSERT STATE CODE NUMBER, where applicable.
- j. Nothing in this agreement shall prohibit the Lead Agency from contracting for the provision of any or all of the services enumerated herein; however, should the Lead Agency choose to contract for any services, ascribed to it by this Agreement, the other member agency shall have the first right to provide the service to be contracted, subject to the concurrence of the Service Review Committee. All contracts and agreements shall be approved by the Service Review Committee;
- k. Collect and report paratransit service data used to determine costs sharing by the member agencies to the Service Review Committee and member agencies.

Article 4. Project Manager.

The Project Manager shall be responsible for administering the Plan on behalf of the member agencies, under the direction and control of the Service Review Committee. The duties of the Project Manager, which may be changed from time to time, include, but are not limited to, the following:

- a. Prepare an annual budget and financial report for review by the Service Review Committee and approved by the governing boards of the member agencies;
- b. Investigate the availability of and apply for grants, funds and other sources of revenue to fund the Plan's activities;
- c. Account for all revenues and expenditures to the Service Review Committee;
- d. Serve as a liaison between the member agencies and customers, and other local and regional agencies.
- e. Be responsible for setting, noticing and recording all meetings and activities occurring under this Agreement to insure compliance with applicable federal, state and local requirements;
- f. Provide customer services and participate in the resolution of customer concerns;

- g. Oversee the activities of the Broker and service providers to insure that the terms and conditions of the service and any contracts are consistent with the requirements of the Plan;
- h. Coordinate the preparation of the annual plan update and its submission to all applicable governmental agencies.

Article 5. Broker.

The Broker shall assist in securing the paratransit service anticipated under the Plan for the member agencies and their customers, under the direction and control of the Service Review Committee. The duties of the Broker, which may be changed from time to time, include, but are not limited to, the following:

- a. Receipt of calls for service, scheduling of trips for and coordinating interzonal paratransit trips not scheduled by participating city programs or a member agency;
- b. Issue, account for and collect used trip vouchers, as necessary;
- c. Collect trip data from participating city paratransit programs and prepare periodic service reports;
- d. Cooperate and provide necessary information for the preparation of an annual audit;
- e. Determine and certify ADA eligibility in accordance with established criteria and maintain an eligibility data base;
- f. Interface with vendors and service providers to assure consistent and satisfactory levels of service consistent with the Plan;
- g. Provide budgeting assistance to the Project Manager and participating city programs;
- h. Be a liaison between customers, city program staff, the Project Manager, and the Service Review Committee;
- i. Coordinate provider and customer training programs;
- j. Provide adequate staff support to carry out the Plan.

Article 6. Indemnification.

Each member agency shall be a named additional insured in the insurance policies of the Project Manager, the Broker and the Service Providers. The Project Manager, Broker and Service Providers shall indemnify, hold harmless and defend each member agency, its elective and appointive Boards, Commissions, Officers, agents and employees, from and against any liability for any damages or claims for damages for personal injury, including death, property damage or any civil rights litigations arising from their or their contractors', subcontractors', agents' or employees' activities related to this Agreement or carrying out the Plan. To the extent the insurance or other resources of the indemnitors are insufficient to protect the member agencies from any liability, the member agencies' liability shall be apportioned between them according to the cost-sharing principles established for the provision of complementary paratransit services by the member agencies in the Plan, and any subsequent updates of the Plan.

Each member agency, when it is the Lead Agency, shall hold harmless and defend the other member agency, its elective and appointive Boards, Commissions, Officers, agents and employees, from and against any liability for any damages or claims for damages for personal injury, including death, or property damage arising from its or its contractors', subcontractors', agents' or employees' activities under this Agreement.

Article 7. Compensation.

The expenses to be borne by the agency members for carrying out the Plan shall be determined as follows:

- a. For Fiscal Year INSERT YEAR, the Consortium will receive an operating subsidy of LIST FUNDS. The member agencies are not expected to pay for the service this year.
- b. In subsequent fiscal years, when federal, state or local funds available for paratransit services are insufficient to cover the costs for these services under the Plan, then each member agency's share of the unfunded portion of the operating budget shall be as follows:
 1. In the first year that the member agencies are required to pay, the amount paid by each member agency will be based on the estimated costs for the service and shall be apportioned among the member agencies according to the estimated service proportions described in the Plan.
 2. In every succeeding year, each member agency's proportionate share will be based on the actual costs of providing the service in the previous year, as determined by an audit of the prior year's service costs. The audit shall be performed by an independent auditor mutually agreed upon by both parties. Any credit or debit resulting from the audit shall be reflected in each member agency's proportionate share.

- c. Each member agency shall promptly pay the Lead Agency its monthly share of the costs of its service, as determined above in subparagraph b. The monthly invoice from the Lead Agency shall be due and payable within 30 days of its receipt.
- d. A member agency who fails to meet its financial commitments is responsible for defending and paying any liabilities, costs and judgments which may result from such delinquency, including but not limited to, service failures, lawsuits and loss of any funding from outside sources. If a member agency chooses to pay any obligation of a delinquent member agency, it shall be entitled to full reimbursement plus interest at the legal interest rate established in the State's Code of Civil Procedure section or any successor section.
- e. The Lead Agency shall be credited for in-kind services provided in the performance of the services identified in Article 1. The credit shall be applied against the amount required of that member agency for the fiscal year immediately following its turn as Lead Agency. The Lead Agency shall keep records of the hours performed by its employees and/or contractors and other in-kind services provided in the accomplishment of the tasks identified in Article 1. The amount any member agency may charge for these services shall be subject to the following limitations:
 - 1. Staff charges shall be agreed to by the member agencies, based on the salary for the positions involved plus overhead and benefits;
 - 2. Contractor charges shall be agreed to by the member agencies, based on the contract price charged by any contractor determined in accordance with applicable federal and/or state procurement provisions.
 - 3. Other in-kind services shall be agreed to by the member agencies, but must be identified with particularity and the costs associated with them shall be fully described and justified.
- f. If it becomes necessary for the Lead Agency to file suit, the member agencies shall pay reasonable attorney's fees and costs associated with any litigation, undertaken on behalf of the member agencies, including prosecution and/or defense. Any monetary losses from an unsuccessful prosecution/defense or unenforceable or an uncollectible judgment, or any monetary judgment in favor of the member agencies (including insurance proceeds or other recovery), shall be borne or distributed in proportion to their respective percentage of the operating budget identified in subparagraph 7.b. Any losses or favorable judgments shall be charged or credited to the operating budget in the year in which the charge or credit is made or received.
- g. The fiscal year budget for each fiscal year, other than the first fiscal year this Agreement is in effect, shall be prepared and submitted to the member agencies by the end of February of the prior fiscal year. For the first fiscal year, the budget shall be prepared as soon as practicable after this Agreement has been executed by the

member agencies. An adjustment of each member agency's contribution in any fiscal year shall be made after the audit of the preceding fiscal year and credited or debited in the fiscal year following the year in which the audit occurred.

- h. If a member agency requests any service, which is beyond the service provided for in the Plan, it shall be considered a "sole benefit" expense to be borne solely by that member agency, and shall not be included in the calculation of the budgetary obligation of the other member agencies. This "sole benefit" exception also shall include any and all legal costs associated with it. The member agency requesting the "sole benefit" shall indemnify, defend and hold harmless the other member agency, its officers, employees and agents from and against any and all liability for damages or claims for damage for personal injury, including death, as well as the claims from property damage which may arise from that service.

Article 8. Service Review Committee.

- a. Purpose. The Service Review Committee shall provide direction to the Lead Agency, the Project Manager and the Broker. The Service Review Committee shall also be the arbitrator of disputes between the Project Manager, the Broker and/or service providers.
- b. Membership. The Service Review Committee shall consist of the General Manager (or his/her designee) from each member agency. Each General Manager shall designate an alternate staff member, to act as his/her representative on the Service Review Committee in his/her absence. The member agencies shall be advised of the designee within 30 days of the execution of this Agreement.
- c. Direction. In accordance with each member agency's practices, each General Manager shall be responsible for reviewing with and obtaining direction from his/her governing board on issues and actions coming before the Service Review Committee.
- d. Required Votes; Approvals. Each member of the Service Review Committee shall have one vote. The agreement of both General Managers (in his/her absence, the vote of his/her designee) is required on issues and actions which come before the Service Review Committee. If there are any disagreements between the voting members of the Committee, then the matter shall be referred to the governing bodies of the member agencies for resolution. If the member agencies cannot resolve the matter then it shall be settled as provided in Article 12.

If additional agencies join this Consortium, then each member agency is entitled to one vote on the Committee and a majority of the affirmative votes of the Committee's membership, in attendance at the meeting, is required to carry any motion.

- e. Quorum. A quorum consists of two voting members of the Committee, i.e. both General Managers, or both designees in the absence of the General Managers, or one General Manager and one designee in the absence of that member agency's General Manager. If there are more than two member agencies participating in this Consortium, then a quorum is a majority of the authorized voting members from each member agency.
- f. Minutes. The minutes of each Committee meeting shall be provided to each Committee member and the governing board of each member agency.
- g. Budget. The Service Review Committee shall review and submit the budget for each fiscal year to the governing bodies of the member agencies for approval and adoption.

Article 9. Advisory Committee.

- a. Purpose. The Consortium Advisory Committee shall be an Advisory Committee to the Services Review Committee. This committee shall provide advice on planning, policy and other matters, relating to the provision of paratransit services provided under this Agreement.
- b. Membership. This Committee shall be comprised of the following voting members:

LIST NUMBER AND TYPES OF PUBLIC MEMBERS
EXAMPLES COULD INCLUDE

- One (1) staff representative from each member agency, selected by the General Manager of that agency;
- One (1) member of each member agency's accessibility committee/task force, selected from and by the members of the committee/task force, or if none, as determined by the governing body of that member agency, subject to the selection criteria set forth below;
- One (1) representative from each county's Paratransit Coordinating Committees (PCCs), selected from and by the members of each committee, subject to the selection criteria set forth below;
- One (1) representative from an existing city-based paratransit program in each county, selected by and from the existing city-based paratransit programs in each county.

The voting member from the accessibility committee/task force and from the PCCs shall be determined according to the following criteria:

1. The voting member must be a certified ADA paratransit consumer. If no one from the group is available who meets this requirement, then,
 2. The voting member must be a member who represents individuals who are certified ADA paratransit consumers. If no one from the group is available who meets this requirement, then,
 3. The voting member may be any member of the group.
- c. Non-Voting Ex-Officio Members. The Project Manager, and the Broker shall be non-voting ex-officio members of the Committee.
 - d. Required Votes; Approvals. Each Committee member is entitled to one vote, and a majority of the Committee's authorized voting membership present at the meeting is required to carry any recommendation or motion.
 - e. Quorum. A majority of the voting members of the Committee shall constitute a quorum.
 - f. Minutes. The minutes of each Committee meeting shall be provided to each Committee member and to the committees, organizations, or entities of each of the committee representatives.

Article 10. Termination/Withdrawal.

- c. Individual Member Withdrawal. A member agency may terminate its participation under this Agreement at any time by providing written notice one year prior to such termination to the other member agencies. The notice of termination may be rescinded upon written notice to the other member agencies any time before the effective date of termination, provided, however, that the other member agencies must approve such rescission.

Each member agency is responsible for its contribution to the funding of the Plan and its obligations under this Agreement during the term of this Agreement. If the member agencies have executed a long-term contract for paratransit services which includes a commitment to claim and expend paratransit financial assistance which a terminated member agency is eligible to claim, the terminated member agency shall be bound by such commitment. A long-term contract for purposes of this Agreement is any agreement or commitment which extends beyond a single fiscal year. The terminated member agency shall not claim, but instead shall assist the Service Review Committee, the Lead Agency and other personnel identified in this Agreement to claim such financial assistance during the term of such contract. If possible, the member agencies will cooperate to arrange an equitable division of the obligations and benefits of any outstanding long-term contracts. A terminated member agency shall continue to provide assurances and perform acts as may be required for any

claim and/or grant application to fund the services for any long-term contracts which continue in existence beyond the date of termination. During the term of any long-term contract, the terminated member agency shall continue to receive coordinated paratransit services within its area in proportion to the financial assistance which is attributable to such terminated member agency. A terminating member agency shall have no financial obligation under this Agreement after the effective date of its termination, except as specified above.

- d. Complete Dissolution. If the member agencies have executed a long-term contract for paratransit services which cannot be canceled or divided and which includes a commitment to claim and expend financial assistance for the period of such contract, then this Agreement shall remain in effect during the term of such contract unless reasonable alternate terms can be negotiated with the other party to the long-term contract.

Article 11. Disposition of Money and Property.

Upon the withdrawal of a member agency, any property acquired by the members jointly under this Agreement and any credits or debits shall be determined upon the close of the fiscal year, as provided in Article 7.a and distributed to or collected from the withdrawing agency. To facilitate such distribution, property may be distributed in kind or reduced to cash by sale. Any distribution of cash, including surplus monies, to a member agency in excess of its actual contributions shall be at the recommendation of the agency originally disbursing the funds. If member agencies cannot agree upon the valuation of acquired property or upon their distributive shares, the disagreement shall be referred to a panel of three referees for decision. One referee shall be appointed by the member disputing the valuation or disposition. One referee shall be appointed by the members supporting the valuation or distribution. One referee shall be appointed by the two referees first appointed.

Article 12. Miscellaneous.

- a. Term of Agreement. This Agreement shall become effective upon execution by member agencies and shall remain in full force and effect until terminated as provided for in this Agreement.
- b. Amendment. This Agreement shall be amended only with the unanimous approval of all member agencies.
- c. Additional Members. Additional members may be added to this Consortium and Agreement with the consent of the member agencies and the additional member.
- d. Dispute Resolution. If a dispute among the member agencies cannot be resolved by their governing bodies, then a mediator shall be retained by the parties to assist them in resolving the dispute. The mediator shall be selected from a panel of five mediators established by the parties subsequent to the execution of this Agreement. The parties shall strike mediators from the list until only one mediator remains. The

determination of which member agency strikes first shall be determined by a flip of a coin. The costs of the mediator shall be shared equally by the member agencies.

- e. Successors. This Agreement shall be binding upon and insure to the benefit of any successors or assigns of the member agencies.
- f. Plural. As used in this Agreement any singular term includes the plural.
- g. Severability. Should any part, term, portion, or provision of this Agreement be finally decided to be in conflict with any law of the United States or of the State of INSERT STATE, or otherwise be unenforceable or ineffectual, the validity of the remaining parts, terms, portions, or provisions of this Agreement shall be deemed severable and shall not be affected thereby, provided that such remaining parts, terms, portions, or provisions can be construed in substance to constitute the Agreement that the member agency intended to enter into in the first instance.

IN WITNESS WHEREOF, the parties hereto have executed this AGREEMENT by authorized officials on the dates indicated below:

INSERT NAME OF AGENCY

By: INSERT NAME AND TITLE

DATE: INSERT DATE

INSERT NAME OF AGENCY

By: INSERT NAME AND TITLE

DATE: INSERT DATE

MODEL AGREEMENT FOR COORDINATING A JOINT TICKET PROGRAM

AGREEMENT AMONG THE *(List all agencies)* _____

This Agreement is for the period from _____ through _____

By and with the *(List all agencies)* _____

WITNESSETH

WHEREAS, _____ is a transit district duly created and acting under the laws of the State _____, operating a public transit system in _____ Counties; and _____

(Repeat this WHEREAS for all participating agencies.)

WHEREAS, _____

have determined that a Joint Ticket for use on public transit vehicles will encourage transit use.

WHEREAS, it is the intention of *(List all agencies.)* _____

to enter into an agreement providing for the sharing of revenues from the joint Ticket Program;

NOW, THEREFORE, in consideration of these premises, the parties hereto agree as follows:

ARTICLE I DESCRIPTION OF THE PROGRAM

(Insert description of Joint Ticket and its valid period of use)

All parties to this agreement shall accept the Joint tickets on their systems subject to the conditions specified in Article VI D herein for the fixed periods specified above.

The Joint tickets shall be priced according to Schedule A (Attached hereto and incorporated by reference.) Any modifications to this pricing schedule must be approved in advance by *(List agencies or committee)*_____

Definitions

(The following are examples that might be included in this section.)

“Fare” shall mean the price charged to transport a patron using transit services provided by parties to this agreement.

“Joint Ticket Committee” shall mean a group comprised of one representative from each party to this agreement, which shall administer the Agreement on behalf of the parties as described herein.

“Local fare credit” shall mean the fare required to ride a transit system in its local service area.

ARTICLE II. JOINT REVENUE REIMBURSEMENTS FOR THE JOINT TICKET FOR WHICH CASH IS RECEIVED DURING THE TERM OF THE TERM OF THE AGREEMENT

A. COMPENSATION FORMULA

1). The pricing of each Joint ticket is based on the following *(insert pricing formula)* _____

2). Bus operators shall be compensated based on the following formula: *(Insert agreed-upon formula for sharing revenues.)*_____

B. ALLOCATION AMONG BUS OPERATORS

Follow-up surveys to adjust the allocation percentages in Schedule B shall conducted in the future a majority vote Joint Ticket committee members. The Committee shall decide who will design and conduct this survey.

ARTICLE III. INFORMATION REPORTING REQUIREMENTS

All parties agree to make available to one another current and historical information necessary for the monitoring and evaluation of the program. *(List agencies)* _____

shall provide data, and an explanation in writing, of methodologies used for data collection, to any party to this agreement within (30) days of a written request from any other party to this Agreement.

(List agencies) _____
agree to report the Joint Ticket Committee existing adult fares, and any fare and pass price changes in advance of their implementation. All fare changes shall be reflected in the revenue distribution in the quarter following the period of the effective increase (decrease).

ARTICLE IV. RECORDS AND AUDITS

This agreement is subject to the examination and audit of the auditor General of the State of _____ for a period of the three (3) years after final payment under this Agreement. The examination and audit shall be confined to those matter connected with the performance of the Agreement, including, but not limited to, the cost of administering the Agreement.

During the term of this Agreement, the parties shall permit an authorized representative of another party, upon reasonable request, access to inspect, audit and make copies of its ridership data and records relating to this Agreement.

ARTICLE V. INDEMNITY

Each party to this Agreement agrees to save harmless each and every other party to this Agreement, their directors, commissioners, officers, agents and employees from liability arising out or in connection with any party's performance under this Agreement; excepting only any party may recover from any other party monies or returned based on a miscalculation of the compensations due under this Agreement.

Each party to this Agreement agrees to defend and indemnify each and every other party to this Agreement, their directors, commissioners, officers, agents and employees against any claim or for any liability arising out of in connection with bodily injury, property damage or personal injury to any third party based on such third party's use of indemnitor's transit operations or the third party's presence on the indemnitor's property, unless such claim arises out of the sole negligence or willful misconduct of the indemnified party or its directors, commissioners, officers, agents, contractors or employees.

The parties may agree to the joint legal; representation and the sharing of all related costs and expenses, including legal fees of outside counsel, for all third party claims or liability imposed upon any party to this Agreement and arising from this Agreement which are not addressed above. The sharing of such costs shall be according to a mutually agreeable formula.

ARTICLE VI. GENERAL PROVISIONS

A. FARES

Each participating operator shall be responsible for the setting of fares for, and operation of all its services.

B. MARKETING AND DISTRIBUTION

Periodic meetings of the Joint Ticket Committee shall be held to prepare and approve program marketing expenses. These expenses will be shared as described in Article VI, Paragraph J below.

Joint tickets will be distributed at sales both operated by each of the participating agencies.

Each party may inform the public of the policy established in this Agreement by any means it deems appropriate, including but not limited to, graphics, printed material, promotions, and signs.

C. AMENDMENTS

This Agreement may be modified, supplemented, or amended only by a written agreement of all parties hereto in accordance with applicable law.

Additional transit operators may be added as parties to this Agreement under the same terms and conditions as then exist for all current parties to this Agreement.

All amendments to this Agreement are subject to the review and unanimous approval of the Joint Ticket Committee.

D. CONDITIONS OF USE OF JOINT TICKETS

(Examples that might be included in this section)

(Name of Agency): _____: Joint tickets shall be valid on all routes except Route # _____ and Route # _____.

(Name of Agency): _____ Joint tickets shall be valid as local fare credit on all routes.

E. COOPERATION

In cases where it is imperative that other restrictions not detailed in VI., D. above be placed in usage of the Joint ticket by a particular operator, the Joint Ticket Committee must be notified by that operator 30 days in advance of the imposition of such restrictions. An abbreviated version of the terms and conditions will be printed on available space on the backside of the Joint tickets

Each party will use its best efforts to implement the policy established in the Agreement, and will cooperate with the other parties in resolving and operational problems which may arise from its implementation and operation.

F. ENTIRE AGREEMENT

This Agreement is the entire agreement of the parties. Each party represents that in entering into this Agreement it has not relied on any previous representations, inducements or understanding of any kind or nature.

This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original, but such counterparts together shall constitute one and the same instrument.

G. TERM

This Agreement is in effect until (*insert date*) _____, or until terminated as provided in Section H, which occurs sooner.

H. TERMINATION

The parties hereto reserve the right to terminate their participation in this Agreement upon 60 day written notice to all other parties. The written notice notifying other parties must specify the reason for the termination and the date upon which the termination becomes effective.

During the period before the termination date, all parties shall meet to resolve any dispute which may be the cause of said termination, unless all parties agree in writing not to do so.

I. NON-PRECEDENT SETTING

This Agreement is not intended as a precedent for the sharing of revenues after termination of this Agreement, or for other inter-operator pass or ticket programs. Any arrangements concerning the sale, collection of revenues, and payments between the parties concerning Joint tickets after termination of this Agreement, or concerning other inter-operator pass or ticket programs, will be the subject of one or more separate agreements.

J. COSTS

- 1) Except as provided in Paragraph 2 below, each party shall bear its own internal costs associated with being a participant in this agreement, including, without limitation any reporting or auditing costs.
- 2) All participants to this agreement shall share the common costs of managing the program. These management costs are divided into three areas, as follows.
 - a. Clearinghouse costs. The clearinghouse costs for this Agreement consist of the Lead Agency's Customer Service labor costs, Treasury Department labor costs, Accounting Department labor costs, Joint ticket stock costs, and ticket delivery service costs. Estimated dollar figures for the first year's costs are detailed in Schedule C. Clearinghouse costs for the latter two (2) years of this Agreement shall be calculated using the actual wage rates for the year during which these costs were incurred. After the first year of this Agreement, any party to this Agreement may request a renegotiation of the methodology utilized to calculate these clearinghouse costs. The amount of interest earned by the Lead Agency as a result of retaining program revenues shall be computed by the Lead Agency's Treasury Department, and shall be subtracted from these clearinghouse costs before each operator's share is allocated. Clearinghouse costs will be allocated across all program participants in proportion to total revenues received under the Joint Ticket program during the prior distribution period.
 - b. Marketing costs. The marketing costs for the first year of this agreement are detailed in the Schedule C. The marketing costs of the program for the remaining two (2) years of this agreement shall be set by a majority of the Joint Ticket Committee. These costs shall be shared in the manner described in sub-paragraph a. above.
 - c. Management costs allocation. One-fourth of the annual costs described in Paragraphs a., and b. will be subtracted from each quarterly bus share reimbursement, and will be allocated among each operator as described in Paragraph a. above.

K. GOVERNING LAW

This Agreement shall be deemed to be made in accordance with the laws of the State of _____.

L. SEVERANCE

If any part of this Agreement is declared invalid by a court of law, such decision will not affect the validity of any remaining portion, which shall remain in full force and effect. Should the severance of any party of the Agreement materially affect any of the rights or obligations of the parties, the parties, the parties will negotiate in good faith to amend this Agreement in a manner satisfactory to all parties.

ARTICLE VII. NOTICES

All statements, payments, financial and transfer trip reports, notices or other communications to a party by another shall be deemed given when made in writing and delivered or mailed to such party at their respective addresses as follow: *(List all agencies with address and contact person)* _____

SCHEDULE A

JOINT TICKET PRICES

(Example)

PRICE*	AGENCIES' SHARE
\$28	
\$33	
\$37	
\$42	
\$47	
\$52	
\$56	
\$61	

* Figures calculated using the following formula: *(Insert formula from Article II A (1))*

SCHEDULE B

PERCENT OF JOINT TICKETS CREDITED TO BUS AGENCY*

(Example)

AGENCY	PERCENT
AGENCY NAME	50%
AGENCY NAME	30%
AGENCY NAME	20%

* Based on survey dated _____. These percentages may change based on future surveys, as described in Article II.

SCHEDULE C
JOINT TICKET PROGRAM FY____ COSTS

(Example)

TYPE OF COST	ESTIMATES
Clearinghouse Costs Customer Service Treasury Accounting Tickets Federal Express Subtotal	
Marketing Costs Brochures Signs Subtotal	
Estimated FY _____ Program Costs	

IN WITNESS WHEREOF, the parties hereto have executed this AGREEMENT on the day first mentioned above.

_____*(Name of agency)*

By: _____ *(Name of authorized signatory)*

Authorized by *(Name of Agency)*'s Board of Directors

Resolution No. _____

Adopted: _____

(Name of agency)

By: _____ (Name of authorized signatory)

Authorized by (Name of Agency)'s Board of Directors

Resolution No. _____

Adopted: _____

(Name of agency)

By: _____ (Name of authorized signatory)

Authorized by (Name of Agency)'s Board of Directors

Resolution No. _____

Adopted: _____

CCAM FINAL POLICY ON COORDINATED HUMAN SERVICE TRANSPORTATION
PLANNING



Federal Interagency Coordinating Council on Access and Mobility

Coordinated Human Service Transportation Planning

FINAL POLICY STATEMENT

Policy Statement

Consistent with the requirements of the Executive Order and the statutory creation of a locally-developed, coordinated public transit human service transportation planning process established in the Safe, Affordable, Flexible, Efficient, Transportation Equity Act-A Legacy for Users (SAFETEA-LU), members of the Federal Interagency Coordinating Council on Access and Mobility (CCAM) adopt the following policy statement:

“Member agencies of the Federal Coordinating Council on Access and Mobility resolve that federally-assisted grantees that have significant involvement in providing resources and engage in transportation delivery should participate in a local coordinated human services transportation planning process and develop plans to achieve the objectives to reduce duplication, increase service efficiency and expand access for the transportation-disadvantaged populations as stated in Executive Order 13330.”

NOTE: Significant involvement is defined as providing, contracting for and/or subsidizing individual transportation trips for individuals with disabilities, older adults, or people with lower incomes.

Background

Presidential Executive Order 13330 on the Coordination of Human Service Programs issued by the President on February 24, 2004, creates an interdepartmental Federal Council on Access and Mobility to undertake collective and individual departmental actions to reduce duplication among federally-funded human service transportation services, increase the efficient delivery of such services and expand transportation access for older individuals, persons with disabilities, persons with low-income, children and other disadvantaged populations within their own communities.

As a first principle to achieve these goals, federally-assisted grantees involved in providing and funding human service transportation need to plan collaboratively to more comprehensively address the needs of the populations served by various Federal programs. In their report to the President on the Human Service Transportation Coordination, members of the Council recommended that “in order to effectively promote the development and delivery of coordinated transportation services, the Administration seek mechanisms (statutory, regulatory, or administrative) to require participation in a community transportation planning process for human service transportation programs.

In August 2005, the President signed legislation consistent with this recommendation to reauthorize Federal public transportation and Federal highway programs that contained provisions to establish a coordinated human services transportation planning process. This legislation, the Safe, Affordable, Flexible, Efficient Transportation Equity Act, A Legacy for Users (SAFETEA-LU), created a requirement that a locally-developed, coordinated public transit/human service planning process and an initial plan be developed by 2007 as a condition of receiving funding for certain programs directed at meeting the needs of older individuals, persons with disabilities and low-income persons. The plan must be developed through a process that includes representatives of public, private and non-profit transportation providers and public, private and non-profit human service providers and participation by the public. Complete plans, including coordination with the full range of existing human service transportation providers, are required by Fiscal Year 2008

Implementation

Members of the Federal Council on Access and Mobility will undertake actions within six months of Council adoption to accomplish Federal program grantee participation in locally-developed, coordinated public transit/human service coordinated planning processes.

CCAM FINAL POLICY ON VEHICLE RESOURCE SHARING



Federal Interagency Coordinating Council on Access and Mobility

Vehicle Resource Sharing

FINAL POLICY STATEMENT

Policy:

Federal Executive Order 13330 on Human Service Transportation Coordination directs Federal agencies funding human services transportation services to undertake efforts to reduce transportation service duplication, increase efficient transportation service delivery, and expand transportation access for seniors, persons with disabilities, children, low-income persons and others who cannot afford or readily use automobile transportation. Consistent with this presidential directive, members of the Federal Interagency Coordinating Council on Access and Mobility (CCAM) adopt the following policy statement:

“Member agencies of the Federal Coordinating Council on Access and Mobility resolve that Federally-assisted grantees that have significant involvement in providing resources and engage in transportation should coordinate their resources in order to maximize accessibility and availability of transportation services”.

Background:

Often Federal grantees at the State and local levels restrict transportation services funded by a Federal program to clients or beneficiaries of that Federal program. Some grantees do not permit vehicles and rides to be shared with other federally-assisted program clients or other members of the riding public. Federal grantees may attribute such restrictions to Federal requirements. This view is a misconception of Federal intent. In too many communities, this misconception results in fragmented or unavailable transportation services and unused or underutilized vehicles. Instead, federally assisted community transportation services should be seamless, comprehensive, and accessible to those who rely on them for their lives, needs, and livelihoods.

Purpose:

This policy guidance clarifies that Federal cost principles do not restrict grantees to serving only their own clients. To the contrary, applicable cost principles enable grantees to share the use of their own vehicles if the cost of providing transportation to the community is also shared. This maximizes the use of all available transportation vehicles and facilitates access for persons with disabilities, persons with low income, children, and senior citizens to community and medical services, employment and training opportunities, and other necessary services. Such arrangements

can enhance transportation services by increasing the pool of transportation resources, reducing the amount of time that vehicles are idle, and reducing or eliminating duplication of routes and services in the community.

Applicable Programs:

This policy guidance applies to the programs listed at the end of this document, as well as any other Federal program that allows funds to be used for transportation services. Any specific arrangements would be subject to the rules and policies of participating program(s). This guidance pertains to Federal program grantees that either directly operate transportation services or procure transportation services for or on behalf of their clientele.

Federal Cost Principles Permit Sharing Transportation Services:

A basic rule of appropriations law is that program funds must only be used for the purposes intended. Therefore, if an allowable use of a program's funds includes the provision of transportation services, then that Federal program may share transportation costs with other Federal programs and/or community organizations that also allow funds to be used for transportation services, as long as the programs follow appropriate cost allocation principles. Also, if program policy permits, vehicles acquired by one program may be shared with or used by other Federal programs and/or community organizations to provide transportation services to their benefiting population.¹

Federal agencies are required to have consistent and uniform government-wide policies and procedures for management of Federal grants and cooperative agreements – i.e., a “Common Rule.” Federal agencies are also required to follow uniform cost principles for determining allowable costs found in OMB circulars, the guidance which the Office of Management and Budget (OMB) developed on these matters.

These circulars set forth the standard Federal cost principles for determining allowable costs. For example, the allowability of costs incurred by State, local or federally-recognized Indian tribal governments is determined in accordance with the provisions in OMB Circular A-87, *Cost Principles for State, Local, and Indian Tribal Governments*. The allowability of costs incurred by non-profit organizations is determined in accordance with the provisions in OMB Circular A-122, *Cost Principles for Nonprofit Organizations*. The allowability of costs incurred by education institutions is determined in accordance with the provisions in OMB Circular A-21, *Cost Principles for Education Institutions*. The OMB Circulars are available at <http://www.whitehouse.gov/omb/circulars/index.html> .

OMB also required Federal agencies that administer grants and cooperative agreements to State, local and Tribal governments to put the uniform standards into their respective regulations. The table below illustrates where in the Code of Federal Regulations (CFR) you may find the uniform management and financial standards for applicable programs by responsible department.

¹ Program funds mean Federal funds. To the extent allowable under the applicable program's statutory and regulatory provisions, program funds also mean any State or local funds used to meet the Federal program's matching or cost-sharing requirement.

Department	Grants Management Common Rule (State & Local Governments)	OMB Circular A-110 (universities & non-profit organizations)
Agriculture	7 CFR 3016	7 CFR 3019
Commerce	15 CFR 24	15 CFR 14
Defense	32 CFR 33	32 CFR 32
Education	34 CFR 80	34 CFR 74
Energy	10 CFR 600	10 CFR 600
Health & Human Services	45 CFR 92	45 CFR 74
Housing & Urban Development	24 CFR 85	24 CFR 84
Interior	43 CFR 12	43 CFR 12
Justice	28 CFR 66	28 CFR 70
Labor	29 CFR 97	29 CFR 95
State	22 CFR 135	22 CFR 145
Transportation	49 CFR 18	49 CFR 19
Treasury	--	--
Veterans Affairs	38 CFR 43	--

OMB established Title 2 of the CFR as the single location where the public can find both OMB guidance for grants and cooperative agreements (subtitle A) and the associated Federal agency implementing regulations (subtitle B). To date, the provisions of OMB Circular A-110 have been codified at 2 CFR Part 215; OMB Circular A-21 at 2 CFR Part 220; OMB Circular A-87 at 2 CFR Part 225; and, OMB Circular A-122 at 2 CFR Part 230. Once the consolidation project has been completed, title 2 of the CFR will serve as a “one stop-shop” for grant policies and governmental guidance on applicable financial principles and single audit policy.

None of the standard financial principles expressed in any of the OMB circulars or associated Federal agency implementing regulations preclude vehicle resource sharing, unless the Federal program’s own statutory or regulatory provisions restrict or prohibit using program funds for transportation services. For example, one common financial rule states the following. “The grantee or sub grantee shall also make equipment available for use on other projects or programs currently or previously supported by the Federal Government, providing that such use will not interfere with the work on the project or program for which it was originally acquired. First preference for other use shall be given to other programs or projects supported by the awarding agency. User fees should be considered if appropriate. Notwithstanding the encouragement to earn program income, the grantee or subgrantee must not use equipment acquired with grant funds to provide services for a fee to compete unfairly with private companies that provide equivalent services, unless

specifically permitted or contemplated by Federal statute.”² Hence, this directive clearly signals Federal policy calling for multiple and full use of equipment purchased with grant funds. Grantees may even charge reasonable user fees to defray program costs. Program income includes income from fees for services performed and from the use or rental of real or personal property acquired with program grant funds. As a general matter, each program would use its share of the income in accordance with the program’s regulations or the terms and conditions of the award

In summary, allowability of costs is determined in accordance with applicable Federal program statutory and regulatory provisions and the cost principles in the OMB Circular that applies to the entity incurring the costs. Federal cost principles allow programs to share costs with other programs and organizations. Program costs must be reasonable, necessary, and allocable. Thus, vehicles and transportation resources may be shared among multiple programs, as long as each program pays its allocated (fair) share of costs in accordance with relative benefits received.

A limited number of Federal block grant programs are exempt from the provisions of the OMB uniform standards and the OMB cost principles circulars. Excluded programs in the U.S. Department of Health and Human Services include the Community Services Block Grant program, the Social Services Block Grant program, the Community Mental Health Services Block Grant program, and the Substance Abuse Prevention and Treatment Block Grant program. The State Community Development Block Grant program under the U.S. Department of Housing and Urban Development (HUD) is also an excluded program. State fiscal policies apply to grantees and their subrecipients under these programs. Unless Federal law or any applicable implementing program regulations restrict or prohibit the use of Federal program funds for transportation services, we believe that it is unlikely that a State’s fiscal policies would impede vehicle sharing.

Of course, all recipients (e.g., grantees, subgrantees and subrecipients) of Federal program funds must use the funds in ways that meet all applicable programmatic requirements, together with any limitations, restrictions, or prohibitions.

Possibilities for Meeting Transportation Needs:

- Partner with other program agencies. For example, a program serving the aging population owns and operates shuttle buses that provide transit services for senior citizens in several rural communities. The agency partnered with other programs to expand service to provide transportation for persons with disabilities working in community rehabilitation programs (CRPs), to provide transportation to key employment locations, and to provide Medicaid non-emergency medical transportation. This was done via a cost-sharing arrangement.
- Maximize use. For example, a for-profit organization receiving Federal Head Start funds purchased specially equipped buses to transport children to and from their Head Start facility. Generally, the buses are only used during specific hours of the day. During the idle periods (including evenings and week-ends), the organization rents the vehicles to another program serving seniors and persons with disabilities to provide transportation for recreational events,

² Uniform Administrative Requirements for Grants and Cooperative Agreements to State, Local and Tribal Governments, in the regulations shown in column two of the above table. For example, these provisions appear in the Department of Agriculture’s regulation at 7 CFR 3016.32 and in the Department of Health and Human Services’ regulation at 45 CFR 92.32. These provisions also appear in the Uniform Administrative Requirements for Grants and Agreements with Institution of Higher Education, Hospitals, and Other Non-Profit Organizations (OMB Circular A-110) at 2 CFR 215.34.

and personal needs (e.g., grocery shopping, hair dresser, medical appointments). The rental contract includes payment for extra costs incurred, such as expanded insurance coverage and additional fuel expenses. While this extra service is not allowable with Head Start funds, the income generated by the use of the buses during idle periods may be viewed as incidental to the primary use of the buses, as long as such use does not interfere with regular Head Start transportation services.

- Pool resources. For example, a community action and economic development agency, another non-profit organization, and a community mental health center receiving Community Service Block Grant funds, Community Development Block Grant funds, Social Service Block Grant funds, Community Mental Health Block Grant funds and/or Substance Abuse Prevention and Treatment Block Grant funds teamed up with the State agency that administers the Temporary Assistance for Needy Families (TANF) program and the State's Labor Department. Each funding source provided an allocable amount of seed money to start a shuttle operation service in the local service areas with high unemployment and no public transportation services. Each funding source also pays its fair share of allowable ongoing costs in accordance with the benefit received by each party. The operation is based on fixed routes that connect individuals to job and training sites, outpatient mental health services, and substance abuse treatment and counseling services in the area. The operation also provides a feeder service to connect clientele to public transportation that goes into the downtown area.
- Partner with non-profit or other community organizations. For example, several agencies contracted with a local organization that operates a van service to provide door-to-door service for their clientele, transporting them to key places in the area. Such places include hospitals and other medical facilities, child care centers, senior citizen centers, selected employment sites, and prisons for family visitation purposes.
- Engage the business community. For example, various programs within the State's transportation department, labor department, the TANF agency, and agencies that provide community health care and assistance for the aged worked with employers in the area to contribute to the expansion of a local transportation system. The private system provides shuttle service to selected employment sites and curb-to-curb services to CRCs, senior citizen centers, retail centers, community health centers or substance abuse treatment and counseling centers, hospitals and other locations. The service is sustained through a fare-based system, with each agency benefiting from the expanded service subsidizing an allocable portion of the fares for their clientele. This service helps participating employers and their family members, as well as job seekers, dislocated workers, current employees and their family members to have access to a range of services and opportunities.
- Facilitate car-pooling. For example, a local Workforce Investment Board identified clientele with reliable cars living in various locales that they pay to pick-up other people in their area going to the same employment or training site. Participating riders pay a fare to ride. The State's TANF agency and the State's Office for the Aging also participate in the car pooling activity by defraying a portion of the fare for their riders. These other agencies also help to expand the available cars in different locales by paying for necessary car repairs and insurance cost for their share of participants.

- Arrange ride sharing. For example, an agency that receives program funds to assist elderly individuals purchased a van to transport their clientele to medical services and other destinations. Other program agencies worked out a financial agreement with this agency to pick up their clients living in the same neighborhoods and take them to and from destinations along the van's route.
- Earn income: For example, the State's Department of Transportation noticed that some of the shuttle buses that they own have been underutilized. The Department of Transportation used three of those shuttle buses to launch a fixed bus route service in areas of the State lacking access to adequate transportation to shopping, work, school, training, medical services, and other daily needs. The bus service is open to the public and fares are charged. Other State agencies, such as the Department of Human Services entered into a Memorandum of Agreement to provide program funds to the Department of Transportation for applicable fare costs for their respective clientele benefiting from the service. The income generated could be used to defray operating costs or for other program purposes, in accordance with the applicable program and administrative rules.

Programs Covered:

The following Federal programs generally allow program funds to be used for transportation services. Nevertheless, you should still check with your program liaison as needed, to determine whether the particular service you would like to provide would be an allowable use of funds. For example, under HUD's Community Block Grant Program, funds may be used to pay for certain transportation services (e.g., fares), but not others (e.g., personal auto repair costs or personal auto insurance).

Department of Transportation

DOT/Federal Transit Administration (FTA)/Capital Improvement
 DOT/FTA/Elderly and Persons with Disabilities
 DOT/FTA/Job Access Reverse Commute
 DOT/FTA/New Freedom
 DOT/FTA/Non Urbanized Formula (Rural)
 DOT/Urbanized Formula

Department of Education

ED/Assistance for Education of All Children with Disabilities (Individuals with Disabilities Education Act)

Department of Health and Human Services - Administration for Children and Families (ACF)

HHS - ACF/Community Services Block Grant Program
 HHS - ACF/Head Start
 HHS - ACF/Social Services Block Grants
 HHS - ACF/State Councils on Developmental Disabilities and Protection & Advocacy Systems
 HHS - ACF/Temporary Assistance for Needy Families

HHS – ACF/Promoting Safe and Stable Families Program
HHS – ACF/Development Disabilities Project of National Significance
HHS – ACF/Refugee and Entrant Assistance Discretionary Grants
HHS – ACF/Refugee and Entrant Assistance State Administered Programs
HHS – ACF/Refugee and Entrant Assistance Targeted Assistance
HHS – ACF/Refugee and Entrant Assistance Voluntary Agency Programs

HHS-Administration on Aging

HHS – Administration on Aging (AoA)/Grants for Supportive Services and Senior Centers
HHS - AoA/Programs for American Indian, Alaskan Native, and Native Hawaiian Elders

HHS - Centers for Medicare and Medicaid (CMS)

HHS - CMS/Medicaid
HHS – CMS/State Children’s Health Insurance Program

HHS - Health Resources and Services Administration (HRSA)

HHS - HRSA/ Community Health Centers
HHS - HRSA/Healthy Communities Program
HHS - HRSA/HIV Care Formula
HHS - HRSA/Rural Health Care Network
HHS – HRSA/Rural Health Care Outreach Program
HHS – HRSA/Healthy Start Initiative
HHS – HRSA/Maternal and Child Services Grants
HHS – HRSA/Ryan White CARE Act Programs

HHS - Substance Abuse Mental Health Services Administration (SAMHSA)

HHS - SAMHSA/ Community Mental Health Services Block Grant

Department of Housing and Urban Development (HUD), Office of Community Planning and Development (OCPD)

HUD - OCPD/Community Development Block Grant
HUD - OCPD/ Housing Opportunities for Persons with AIDS
HUD - OCPD/Supportive Housing Program

Any other Federal program that allows funds to be used for transportation services.

APPENDIX B: SERVICE PROVIDER SURVEY



Dixie Area Coordinated Human-Service Public Transportation Plan Human Service Transportation Survey

Agency or Organization Name: _____
Street Address: _____
City, State, Zip Code: _____
Contact Person (*Name & Title*): _____
Contact Telephone Number: () _____ FAX Number: () _____
E-mail Address: _____

1. Is your agency/organization:

- ☐ Public? ☐ Private for-profit?
☐ Private non-profit? ☐ Other (*please specify*): _____

2. What geographic areas do you serve (*i.e. county, city, etc*)?

3. Please identify the types of transportation limitations experienced by your clients: (*check all that apply*)

- | | |
|---|---|
| <input type="checkbox"/> Age-related disability | <input type="checkbox"/> Multiple disabilities |
| <input type="checkbox"/> Physical disability | <input type="checkbox"/> Visual impairment |
| <input type="checkbox"/> Cannot afford motor vehicle | <input type="checkbox"/> Hearing impairment |
| <input type="checkbox"/> Remote location | <input type="checkbox"/> Our clients do not have transportation limitations |
| <input type="checkbox"/> Developmental disability | <input type="checkbox"/> Other (<i>please specify</i>): _____ |
| <input type="checkbox"/> Lack of motor vehicle (<i>for reasons other than income</i>) | |

4. Which services does your agency directly provide or sponsor? (*check all that apply*)

- | | | |
|---|--|---|
| <input type="checkbox"/> Adult Day Care | <input type="checkbox"/> Medicaid | <input type="checkbox"/> Sheltered Employment |
| <input type="checkbox"/> Chore Services | <input type="checkbox"/> Medical/Dental | <input type="checkbox"/> Supported Employment |
| <input type="checkbox"/> Congregate Nutrition | <input type="checkbox"/> Mental Health | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Counseling | <input type="checkbox"/> Recreational/Social | <input type="checkbox"/> Volunteer Opportunities |
| <input type="checkbox"/> Education/Training | <input type="checkbox"/> Rehabilitation | <input type="checkbox"/> Welfare/Food Stamps |
| <input type="checkbox"/> Head Start | <input type="checkbox"/> Religious | <input type="checkbox"/> Other (<i>please specify</i>): _____ |
| <input type="checkbox"/> Home-Delivered Meals | <input type="checkbox"/> Residential Care | |
| <input type="checkbox"/> Job Placement | <input type="checkbox"/> Senior Center | |

**If your agency provides only transportation services, skip to question 9.*

5. How do individuals get to your agency's on-site services? (Indicate the percentage for each mode):

Drive themselves	_____	%
Walk	_____	%
Family, friends, or neighbor	_____	%
Private vehicles driven by agency employee or volunteer	_____	%
Your agency's vehicles	_____	%
Public Transportation	_____	%
Taxi	_____	%
Other (Please Specify): _____	_____	%
TOTAL		Must Equal 100%

6. Does your agency coordinate program schedules to accommodate transportation service patterns?

☐ Yes

☐ No

7. Does your agency have eligibility requirements for its clients?

☐ Age (please specify): _____

☐ Disability (please specify): _____

☐ Income (please specify): _____

☐ Other (please specify): _____

☐ No Eligibility Requirements

8. Is transportation a barrier for people who seek your agency's services?

☐ Yes

☐ No (skip to question 9)

8-a. Indicate why transportation is a barrier and rank in priority, with 1 being highest priority.
(check all that apply)

#

☐ Transportation services are not available _____

☐ Existing transportation providers are too costly _____

☐ Existing transportation services don't operate the same hours as human service agencies _____

☐ Existing transportation services don't serve locations where services are located _____

☐ Existing transportation providers only serve their own clients _____

9. Does your agency fund or provide Transportation Services for its clients?

☐ Yes

☐ No (skip to question 23)

10. What type of Transportation Services does your agency fund or provide? (check all that apply)

☐ Demand Response: Routes and schedules vary according to service requests

☐ Route or Point Deviation: Semi-fixed route that can vary according to service requests

☐ Fixed Route: Routes, stops and schedules do not vary

☐ Other (please describe): _____

11. How do clients schedule a ride?

- ☐ Phone call to one location for multiple destinations
- ☐ Phone call to multiple locations determined by destination
- ☐ No scheduled services are offered

12. How do you provide vehicles and maintenance? (*check all that apply*)

- ☐ We do not own vehicles (*skip to question 18*)
- ☐ We perform our own vehicle maintenance
- ☐ We own our own vehicles
- ☐ We contract out for maintenance service
- ☐ We lease our vehicles

13. Indicate the number of people on your agency's staff who serve as:

Category	Drivers	Attendants	Dispatchers	Other
Full-Time Transportation Personnel				
Part-Time Transportation Personnel				
Unpaid Transportation Volunteers				

14. Indicate the number of vehicles that your agency has available for client transportation services:

Vehicle Capacity	Number of Vehicles	Number that are Wheelchair lift-equipped
4-9 Passengers		
10-15 Passengers		
16-24 passengers		
25- or more passengers		

15. As a percentage, how occupied are these vehicles when in use for client transportation services?
(Write "No Service" if no service is provided at the time specified)

Vehicle Capacity	Weekdays	Saturday	Sunday
<i>Example</i>	<i>50%</i>	<i>10%</i>	<i>No Service</i>
4-9 Passengers			
10-15 Passengers			
16-24 passengers			
25- or more passengers			

16. For your most recent fiscal year: (FY_____)

#

Is this an estimate or an actual figure? (*circle one*)

How many total miles did your vehicles operate?

Estimate or actual

How many total passengers did you transport?

Estimate or actual

How many total hours were your vehicles in service?

Estimate or actual

17. How many of your vehicles need to be replaced:

#

Now

Within the next year

Within the next five years

Other:_____

18. Indicate when your agency provides transportation services. (*check all that apply*)

	6:00 am – 9:00 am	9:00 am – Noon	Noon – 3:00	3:00 – 6:00 pm	6:00 pm – 9:00 pm	9:00 pm – Mid Night	Mid Night – 6:00 am
Weekdays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. Please indicate the types of trips that your agency typically provides. (*check all the apply*)

- | | |
|--|--|
| <input type="checkbox"/> Program at your agency (including Day Treatment, Day Training, Recreation, Education, etc.) | <input type="checkbox"/> Employment |
| <input type="checkbox"/> Congregate Meals | <input type="checkbox"/> Education |
| <input type="checkbox"/> Program at another agency | <input type="checkbox"/> Shopping/Personal Business |
| <input type="checkbox"/> Medical appointment | <input type="checkbox"/> Field Trip/Recreation |
| | <input type="checkbox"/> Other; <i>Specify</i> : _____ |

20. How is transportation service funded at your agency?

- | | |
|--|--|
| <input type="checkbox"/> Charging Customers | <i>If so, how much per trip?</i> _____ |
| <input type="checkbox"/> City, County or special transportation district | |
| <input type="checkbox"/> Donations, United Way, fundraising, volunteers | |
| <input type="checkbox"/> Federal Funds | <i>please specify which program:</i> _____ |
| <input type="checkbox"/> State Funds | <i>please specify which program:</i> _____ |

21. Is your agency's transportation funding restricted to specific groups of customers?

- | | |
|------------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No (<i>if no, skip to question 23</i>) |
|------------------------------|---|

21-a. How are transportation funds restricted? Funds are for: (*Check all that apply*)

- | | | |
|---|---|-----------------------------------|
| <input type="checkbox"/> People with disabilities | <input type="checkbox"/> People with low income | <input type="checkbox"/> Students |
| <input type="checkbox"/> Veterans | <input type="checkbox"/> Children | <input type="checkbox"/> Seniors |
| <input type="checkbox"/> Other (<i>please specify</i>): _____ | | |

21-b. Is the funding restriction (*select one*):

- | | |
|---|--|
| <input type="checkbox"/> Agency Policy? | <input type="checkbox"/> Funding Source Requirement? |
|---|--|

22. Are your agency's transportation trips restricted to specific groups of customers?

- | | |
|------------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No (<i>if no, skip to question 23</i>) |
|------------------------------|---|

22-a. How are transportation trips restricted? Trips are for: (*check all that apply*)

- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> This Agency's Services | <input type="checkbox"/> Emergencies | <input type="checkbox"/> Job training |
| <input type="checkbox"/> Medical Visits | <input type="checkbox"/> Nutrition | <input type="checkbox"/> School |
| <input type="checkbox"/> Veteran Services | <input type="checkbox"/> Other (<i>please specify</i>): _____ | |

22-b. Are the trip restrictions (*select one*):

- | | |
|---|--|
| <input type="checkbox"/> Agency Policy? | <input type="checkbox"/> Funding Source Requirement? |
|---|--|

23. Do your clients routinely have transportation needs that your agency cannot serve?

☐ Yes (*please describe*)

☐ No

24. Thinking of your agency or organization, what transportation needs are not being met adequately?
Please be specific; include any special needs or requirements your clients may have.

25. What types of strategies or actions would you recommend for improving transportation services for elderly, low-income, or disabled members of your community?

26. Indicate your current level of and/or interest in transportation coordination (*check all that apply*):

	We already do this	We are interested in doing this	We are not interested in doing this
Networking with transportation/human service providers to explore coordination opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracting to provide transportation service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Centralized scheduling, dispatch and vehicle tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sharing of vehicles among agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Centralized fuel purchasing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consolidating services to a single provider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracting to purchase transportation service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperatively purchasing vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborate in writing grant applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pooling training resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pooling financial resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pooling insurance resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shared driver/staff training programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (<i>please specify</i>):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for completing this survey! Your assistance is greatly appreciated and will assist Dixie MPO, UDOT and United We Ride in improving transportation services for members of your community.

Questions? Contact Us:
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